Full Contents

Full Contents ................................................................................................................................. i

1 Introduction to SiteExecutive ...................................................................................................... 1
  1.1 Using a Content Management System .............................................................................. 1
  1.2 Understanding the SiteExecutive Features ...................................................................... 1
    1.2.1 User-Designed Interface ......................................................................................... 1
    1.2.2 Enterprise Management ......................................................................................... 1
    1.2.3 Enterprise Implementation and Extensibility ......................................................... 2
  1.3 SiteExecutive System Components ..................................................................................... 3
    1.3.1 SiteExecutive Implementation: Major Components .................................................... 3
  1.4 SiteExecutive Interface Concepts .......................................................................................... 4
    1.4.1 Components of the Administrative Interface ......................................................... 4
    1.4.2 Core Modules ........................................................................................................... 5
    1.4.3 Page Management Features ...................................................................................... 6
  1.5 Facilitating User Proficiency ................................................................................................. 7
    1.5.1 Core Content Management Skills ............................................................................. 7
    1.5.2 Additional Skills ....................................................................................................... 7
    1.5.3 Advanced Content Management Skills ..................................................................... 7
  1.6 SiteExecutive Accomplishments ............................................................................................ 8
  1.7 Sample Client Pages .............................................................................................................. 9

2 Computer Configuration Requirements ....................................................................................... 11
  2.1 Client Configuration Settings ............................................................................................... 11
  2.2 Detailed Configuration Requirements .................................................................................. 11
    2.2.1 Operating System/Hardware ..................................................................................... 11
    2.2.2 Monitor/Resolution Setting ...................................................................................... 12
    2.2.3 Browser Version and Settings ................................................................................... 14
      2.2.3.1 Confirming Browser Version .............................................................................. 14
    2.2.4 Windows Updates ..................................................................................................... 15
    2.2.5 Settings in Internet Explorer .................................................................................... 16
    2.2.6 Trusted Sites ............................................................................................................ 18
  2.3 Supplemental Software .......................................................................................................... 20
    2.3.1 Recommended Utilities .............................................................................................. 20
      2.3.1.1 WinZip ................................................................................................................ 20
      2.3.1.2 Adobe Acrobat Reader ...................................................................................... 21
    2.3.2 Recommended Multimedia Support Software ........................................................... 21
      2.3.2.1 QuickTime Application and Plug-ins ................................................................. 21
      2.3.2.2 Microsoft Media Player ..................................................................................... 21
      2.3.2.3 Shockwave and Flash Applications/Plug-ins ...................................................... 21
      2.3.2.4 Real Media Player ............................................................................................. 21
    2.3.3 Support Software ......................................................................................................... 21
      2.3.3.1 Adobe Acrobat 7.0 ............................................................................................ 21
      2.3.3.2 Commercial Image Programs ........................................................................... 22
      2.3.3.3 Template Design Programs ............................................................................. 22

3 Basic SiteExecutive Functions ...................................................................................................... 23
  3.1 Accessing SiteExecutive ......................................................................................................... 23
    3.1.1 Login Screen ............................................................................................................. 23
  3.2 MySE ..................................................................................................................................... 24
  3.3 Understanding the Administrative Interface .......................................................................... 24
  3.4 Using the Site Tree ................................................................................................................ 25
    3.4.1 Selecting Objects in the Site Tree .............................................................................. 26
    3.4.2 Hiding the Site Tree .................................................................................................. 26
  3.5 Identifying Tabs ..................................................................................................................... 27
    3.5.1 Root and Folder Level Tabs ........................................................................................ 27
      3.5.1.1 General Tab ....................................................................................................... 27
      3.5.1.2 Image Library Tab ............................................................................................ 28
      3.5.1.3 Properties Tab .................................................................................................. 29
      3.5.1.4 Audit Log Tab ................................................................................................... 29
    3.5.2 Page Level Tabs ............................................................................................................ 30
      3.5.2.1 General Tab ....................................................................................................... 30
      3.5.2.2 Preview/Edit Tab ............................................................................................... 31
      3.5.2.3 Approval Tab .................................................................................................... 31
      3.5.2.4 Versions Tab .................................................................................................... 32
      3.5.2.5 Properties Tab .................................................................................................. 32

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Technical Support: 877.797.2554
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4 Core SiteExecutive Content Management Skills ................................................................. 35
  4.1 Creating Folders and Pages .............................................................................................. 35
  4.2 Editing and Saving Page Content .................................................................................. 40
  4.3 Approving and Publishing Page Content ................................................................... 47
  4.4 Uploading Files and Images ......................................................................................... 50
  4.5 Inserting Images ........................................................................................................... 57
  4.6 Inserting Links and Page Anchors ............................................................................... 63
  4.7 File Extensions ............................................................................................................. 56
  5 Advanced Dynamic Navigation ..................................................................................... 75
  5.1 Creating Advanced Dynamic Navigation .................................................................... 75
  5.2 Adding What's New Links ............................................................................................ 75
  5.3 What's Here and See Also ........................................................................................... 78
  5.4 Modifying Settings for the Advanced System Navigation Modules .......................... 78
  6 Tables ............................................................................................................................... 81
  6.1 Inserting a Table ......................................................................................................... 82
  6.2 Accessing Table and Cell Modifying Features ............................................................ 85
  7 Core Modules ............................................................................................................... 91
  7.1 Using Modules ............................................................................................................. 91
  7.2 Inserting Modules on a Page ......................................................................................... 91
  7.3 Current Time Module .................................................................................................. 93
  7.4 Content Search Module ............................................................................................... 95
  7.5 Content Search (Targeted) Module ............................................................................. 99
  7.6 DHTML Link Menu Module ....................................................................................... 107
7.6.1 Inserting the DHTML Link Menu Module .............................................................. 107
7.6.2 Accessing DHTML Link Menu Module Properties ........................................ 111

7.7 Featured Content Module ...................................................................................... 112
7.7.1 Inserting the Featured Content Module on a Page ........................................... 112
7.7.2 Accessing Featured Content Module Properties ............................................. 114
7.7.3 Promoting a Page for Feature on Another Page ............................................. 114
7.7.4 Approving the Featured Content Pages for Display on another Page ............. 116
7.7.5 Viewing the Featured Content Module on the Page ...................................... 118

7.8 HTTP Passthrough Module ................................................................................... 119
7.8.1 Inserting the HTTP Passthrough Module ....................................................... 119
7.8.2 Accessing HTTP Passthrough Module Properties ........................................ 120

7.9 Last Published Module ......................................................................................... 121
7.9.1 Inserting the Last Published Module ............................................................... 121
7.9.2 Accessing Last Published Module Properties ................................................. 122

7.10 Object Inclusion Module ............................................................................... 123
7.10.1 Inserting the Object Inclusion Module ......................................................... 123
7.10.2 Accessing Object Inclusion Module Properties ........................................... 125

7.11 Print This Page Module ...................................................................................... 126
7.11.1 Inserting the Print this Page Module ............................................................. 126
7.11.2 Accessing Print This Page Module Properties ............................................. 128

7.12 Send To A Friend Module ................................................................................... 129
7.12.1 Inserting the Send To A Friend Module ........................................................ 129
7.12.2 Accessing Send To A Friend Module Properties ......................................... 132

7.13 Site Information Module .................................................................................... 133
7.13.1 Inserting the Site Information Module ........................................................... 133
7.13.2 Accessing Site Information Module Properties ........................................... 135

7.14 Site Map Module ................................................................................................ 136
7.14.1 Inserting the Site Map Module ................................................................. 136
7.14.2 Accessing Site Map Module Properties ...................................................... 138

7.15 Site Outline Module ......................................................................................... 139
7.15.1 Inserting the Site Outline Module ............................................................... 139
7.15.2 Accessing Site Outline Module Properties ................................................ 142

8 Advanced SiteExecutive Functions ........................................................................ 143
8.1 Editing Page Properties ..................................................................................... 143
8.2 Changing Templates at the Page Level ............................................................. 145
8.3 Renaming, Copying and Moving Objects ........................................................... 146
8.3.1 Renaming an Object ...................................................................................... 146
8.3.2 Copying an Object ....................................................................................... 147
8.3.3 Moving an Object ....................................................................................... 148
8.4 Replacing Content ............................................................................................ 149
8.5 Replacing Files/Images ..................................................................................... 152
8.6 Deleting Objects ................................................................................................ 153
8.7 Accessing and Sending the URL of a Binary File ............................................. 154
8.8 Archiving and Recalling Pages: The Versions Tab ............................................ 156
8.9 Purging Archives ............................................................................................... 157
8.10 Exporting Files .................................................................................................. 158
8.11 Obtaining Help .................................................................................................. 159
1 Introduction to SiteExecutive

SiteExecutive is a comprehensive web site development and content management software that allows content managers to directly create, update and manage a web site in an efficient and timely manner, while reducing dependency on web masters.

1.1 Using a Content Management System

SiteExecutive accomplishes the following four primary goals that characterize a productive web management tool:

♦ Provides a simple interface that empowers information owners to manage web content.
♦ Eliminates the dependency on technical personnel for creation and management of content.
♦ Delivers information to the web site in minutes.
♦ Provides a convenient and straightforward interface for the inclusion of enterprise applications.

The Goal: To provide visitors with timely and relevant content.

1.2 Understanding the SiteExecutive Features

1.2.1 User-Designed Interface

SiteExecutive strives to make the content manager's experience familiar and easy. To that end, SiteExecutive provides:

♦ Browser-based Management: No applications to install or learn and an increase in workstation Total Cost of Ownership (TCO).
♦ Exceptionally Easy Learning Path: Typical training sessions take no more than a day.
♦ Easy Creation of Site Layout and Hierarchy: Complete visual presentations of site hierarchy and page previews provide constant feedback to the content manager.
♦ Rapid Creation, Editing, and Publishing of Pages: Content managers can publish with unprecedented ease.

1.2.2 Enterprise Management

SiteExecutive provides the tools and features that allow content managers to effectively plan, execute, and maintain their web solution.

♦ Multiple Sites within One Database/SE Instance: A site administrator can support multiple sites from one database and interface (i.e. an organization's Internet and Intranet).
♦ Dynamic, Self-Maintaining Links and Navigation: All links within SiteExecutive are dynamic. Links to pages, documents, graphics, and media are calculated in real-time. Files may be renamed or moved at will without breaking any references.
♦ **Link Validation**: All links may be validated. The Link Validation tool may be scheduled to run at a certain time or can be run manually to check broken external links.

♦ **Extended Find and Replace**: This tool allows an administrator to perform an extended find and replace of content or text throughout all or individual sites in SiteExecutive. This facilitates replacement of content.

♦ **Read, Write, and Administrative Privileges for All Items on Site**: A complete users/groups metaphor allows assignment of read, write and administrative combinations to any object in the system.

♦ **Simultaneous Actions**: Multiple users can edit content simultaneously.

♦ **Complete Workflow/Approvals with Real-time E-mail Notification**: Workflow and approvals are derived from the site structure and are based upon the users and groups established in the system. Each step of the approval process is executed through e-mails with links back to the page preview area in the administrative interface.

♦ **Comprehensive Audit Trails for all Key Functions**: Each edit, update, and publishing event is logged in the audit system for administrative review.

♦ **Unlimited Versions Available for Review/Recall with Complete Logs**: Each published page replaces the current live page and all previous pages are stored in the database for future review or re-publication. There is no limit (beyond database size) to the number of previous versions.

♦ **External Security Model for Controlled Access**: The system provides an easy-to-use interface to restrict external visitor access.

♦ **Process Monitor**: This tool tracks running processes in SiteExecutive. By default, the link validation, and site index/optimize and repair processes are linked for monitoring. Additional processes can be monitored if registered via a module.

1.2.3 Enterprise Implementation and Extensibility

**Application Programming Interface**: Enterprise applications can be integrated for extensibility and integration.

**Centralized Control of the Look & Feel of the Site**: Because information is stored in a central server and database, all changes made by one user are visible to all users. Content does not reside on users’ desktops.

**Simple Installation Path**: An experienced installer can install and have SiteExecutive running on a prepared server in less than 30 minutes.
**Rapid Implementation**: With professional direction or an experienced web master, an organization can have a fully functioning SiteExecutive-based site up and useable within days. This is easiest with organizations that have existing corporate identity and content. However, new projects can take form just as quickly.

**Scalable with Affordable Hardware**: SiteExecutive runs well on basic hardware. Larger sites will require appropriate infrastructure. Basic sites can be deployed on affordable boxes.

### 1.3 SiteExecutive System Components

#### 1.3.1 SiteExecutive Implementation: Major Components

The SiteExecutive system has the following major components that drive all functions:

1. **Database System**: The database, which is XML-based, contains all directly editable data, references any binary objects (uploaded images, files, etc.), and drives all functions.

2. **Code Base**:
   a. **Core Code**: The core functional code base consists of application server scripts, DLL's, and Java code and is extremely compact. Only one code base is required per server, making multi-instance configurations easy to manage.
   b. **SiteExecutive Modules**: Modules are an extension of the core code. There are four general types of modules.
      i. **Core Interface**: These modules drive the administrative interface and are part of the SiteExecutive system. Core interfaces are written by Systems Alliance.
ii. **System Information:** These modules provide content editors and managers access to SiteExecutive information and content. Tools such as the Site Map, Search Interface, and various navigation tools are included in this category. Many system information modules are included with the tool. However, the Application Programming Interface allows some access to this information for customization.

c. **Object Integration:** These modules typically assist with complex tasks that often require extensive surrounding code. Examples of this function include the SiteExecutive module for inserting Shockwave objects and the Form Generation tool.

d. **Enterprise Integration:** This is the primary function of the Application Programming Interface. It allows for complete web-based applications to be designed and written. Content managers can integrate these modules without technical training.

3. **Administrative Interface:** This interface, which is clean, simple and highly intuitive, sets SiteExecutive apart from most, if not all, of its competitors. The administrative interface is comprised of less than 100 extremely small images, which allow it to work easily, even at low bandwidths.

4. **Multi-server Support:** SiteExecutive supports clustered environments natively. This allows separation and independent clustering of authoring and rendering servers and provides an internal messaging system that keeps all servers in the cluster synchronized when a change is made on any other server.

5. **Rendering Engine:** The rendering engine takes the results of core SiteExecutive output and valid output from any custom modules and creates the final output format in real-time. Current rendering defaults to HTML. Other rendering outputs may include a wide range of XML-based formats.

6. **Final Output:** While the default is HTML, final output could be tailored to any form required by the client.

1.4 **SiteExecutive Interface Concepts**

1.4.1 Components of the Administrative Interface

The Administrative Interface provides the core content management functions. It uses easy-to-recognize and familiar icons.

Depending on the installed options and logon privileges for content managers, various functions may or may not be present or may be ‘grayed’ out.

The primary features of the Administrative Interface are illustrated below.
1.4.2 Core Modules

The module interface of SiteExecutive makes it a flexible and powerful tool for advanced web management. It enables users to insert complex output and tools without having to learn web-based application languages.

The entire SiteExecutive interface is composed of individual modules that drive every function. This makes it possible to reconfigure SiteExecutive for various levels of functionality.

The system contains a core set of modules that drive general content management and navigation. Some of these modules include:

- **What's Here**: This module allows the user to build direct link navigation to pages and/or objects in the system.
- **See Also**: This module allows the user to build a drop-down box of links allowing navigation to pages and/or objects in the system.
- **What's New**: This module is similar to What's Here, but allows items in the list to have date (or date/time) constraints for publishing and removal of link navigation.
- **Site Tree**: This module presents a dynamic tree of the site content.
- **Site Search**: This module provides a basic site search interface. The two different search modules provide flexibility to content editors. Results may be displayed on the same page or on a separate page.
1.4.3 Page Management Features

*SiteExecutive* makes it easy to control a wide range of security and workflow/approval processes.

- **Security**: The Security module allows for rapid assignment of external password access to any folder on the site. This makes it possible to create any combination of login pages for multiple areas of a *SiteExecutive* web site.

- **Permissions**: *SiteExecutive* has an internal security module that allows the assignment of a wide range of combinations of access for editing, reading, and administration of site components. Using this tool, users can be granted permission to manage a single page, folder, or the entire web site.

- **Workflow/Approval**: Each folder can be assigned to users, content managers or administrators who must approve information for publishing. These assignments cascade down through the site so a top-level administrator can be included in every change on the site. All approval processes are executed through e-mail notifications and every approval and change is tracked in a variety of audit logs.

- **Versioning**: As each page is published, the previous version is archived for review and recall. There is no limit to the number of previous versions.

- **Searching**: Every page is indexed in real-time when it is published, making it immediately available for searching.

- **Audit Trails**: Almost all actions at the site, folder, page, or object level are recorded for review.

- **Dynamic Calculations**: All references to objects within a *SiteExecutive* instance are calculated in real-time, making broken links almost impossible.
1.5 Facilitating User Proficiency

Creating and managing content of any scale is necessarily complex. The goal of SiteExecutive is to simplify the process for the typical content manager.

Content managers should be able to easily manage general content, create relationships, include modules, and upload and use images and documents. With SiteExecutive, this can be done without technical requirements or HTML skills.

1.5.1 Core Content Management Skills

The average content manager must be familiar with the following basic skills to create and maintain a web site:

♦ Creating folders and pages
♦ Editing and saving page content
♦ Approving and publishing page content
♦ Uploading files and images
♦ Inserting images
♦ Inserting links and page anchors

1.5.2 Additional Skills

Additional skills recommended for the creation and management of web sites include:

♦ Creating advanced dynamic navigation
♦ Inserting tables
♦ Using core modules

1.5.3 Advanced Content Management Skills

♦ Editing page properties
♦ Changing templates at the page level
♦ Renaming, moving and copying objects
♦ Replacing content
♦ Replacing files/images
♦ Deleting objects
♦ Accessing and sending the URL of a binary file
♦ Archiving and recalling pages
♦ Purging archives
♦ Exporting files
♦ Obtaining help
1.6 SiteExecutive Accomplishments

The following outlines the primary challenges typically encountered by a small business or corporate Internet or Intranet project. In addition, it describes how SiteExecutive’s solution mitigates these challenges.

<table>
<thead>
<tr>
<th>Issue</th>
<th>SiteExecutive Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Rapid Implementation</strong></td>
<td>Large web sites can take months to assemble and review. SiteExecutive reduces the time frame to accomplish this task. Content can be viewed as it is approved and published.</td>
</tr>
<tr>
<td><strong>Common Look and Feel</strong></td>
<td>If sites are built on manual templates that are physically part of a page, it is nearly impossible to maintain design standards. SiteExecutive ensures that all pages are based on a common template with applied styles. The content managers cannot change these templates.</td>
</tr>
<tr>
<td><strong>Shared Content Management</strong></td>
<td>Managing content on an Internet or Intranet system may involve dozens or hundreds of people. Coordinating these efforts in a traditional web development system is arduous. SiteExecutive allows any number of associates to create, edit, approve, and maintain content without these concerns.</td>
</tr>
<tr>
<td><strong>Easy Management of Links and Content</strong></td>
<td>Large web sites may have thousands of links within the site, which are frequently hard to maintain. SiteExecutive manages links dynamically by checking them as they are requested.</td>
</tr>
<tr>
<td><strong>Revision Control</strong></td>
<td>Since data is used to create content, SiteExecutive allows the availability of multiple versions of a page. This enables edit and approval of a page without affecting published content.</td>
</tr>
<tr>
<td><strong>Internal/External Security</strong></td>
<td>Access to view and edit pages is controlled through a flexible users/groups interface.</td>
</tr>
<tr>
<td><strong>Workflow</strong></td>
<td>Pages can be assigned a cascading set of workflow assignments that require the content to be approved before it is published.</td>
</tr>
</tbody>
</table>

Fundamentally, SiteExecutive enhances the workflow and reduces the time required to create and maintain a web site.
1.7 Sample Client Pages

The following sample web pages indicate that there are no fixed page configurations for a SiteExecutive site. Templates and styles can have any format, size, or function. Each site shown is entirely client-managed.

Opening Pages

www.jhsph.edu

www.gbmc.org
2 Computer Configuration Requirements

The Administrative Interface of SiteExecutive requires that computers meet specific requirements. Configuration settings and software on computers should be checked prior to the use of the SiteExecutive tool.

The settings are required for the administrative components of SiteExecutive and do not impact the viewing of published pages.

*Note: Reasonable precautions should be taken when updating or changing settings or software on computers.*

2.1 Client Configuration Settings

Windows users should ensure the following standards are met on their computers:

- Confirm availability of a stable system (Windows 2000 or XP).
- Set system resolution to 1024x768 or higher at millions of colors.
- Update the browser to Internet Explorer 6.0 or higher.
- Perform a Windows update for critical updates.
- Set the browser’s temporary Internet settings to check for newer versions of stored pages at *Every Visit to the Page.*
- Add the site to the trusted sites in the web browser.

2.2 Detailed Configuration Requirements

2.2.1 Operating System/Hardware

SiteExecutive requires the availability of a stable installation of Windows 2000 or XP (workstation). The system should be free from frequent crashes or system errors.

To determine a computer’s operating system:

1. On the Windows desktop, right-click the My Computer icon.
2. Select Properties.
The **System Properties** dialog box will appear.

![System Properties](image)

This dialog box allows users to determine the computer’s operating system and installed memory.

- If the RAM is shown in KB instead of MB, users can divide the RAM number by 1024. If the result is not a whole number, users should round up to the nearest whole number.
- A minimum of 64MB of RAM (128MB is preferred) is recommended.

### 2.2.2 Monitor/Resolution Setting

*Note: The screens in this section will vary based on operating system and installed software.*

**To check the monitor settings:**

1. Right-click on the Windows desktop.
2. Click **Properties**.
The **Display Properties** dialog box will appear.

3. Select the **Settings** tab.

   The **Settings** tab will appear. The options here may vary based on the differences in video card and software packages.
4. In the **Screen area** or **Screen resolution**, users should set the resolution to **1024x768** or higher.

5. In the **Colors** or **Color quality**, users should set the image to **True Color (32 bit)** or **Highest (32 bit)**.

6. Click **Apply** or **OK** to confirm changes.

   *Note: Most computers support these settings. If they are not available, it is likely that outdated or incorrect video drivers are installed.*

### 2.2.3 Browser Version and Settings

#### 2.2.3.1 Confirming Browser Version

**SiteExecutive** requires that a system’s browser be updated to **Microsoft’s Internet Explorer 6.0** or a later version.

To check the browser version:

1. Start **Internet Explorer**.
2. Click **Help** on the menu bar.
The **About Internet Explorer** window will appear.

3. Confirm the **Internet Explorer Version** is at least 6.0.

**Note:** To install or update Internet Explorer, users may download the latest version of Internet Explorer from the available list on the Microsoft web site.

### 2.2.4 Windows Updates

**To perform a Windows update:**

1. Start **Internet Explorer**.
2. Select **Tools** on the menu bar.
3. Select **Windows Update**.
4. From the **Windows Update** page, perform a scan for updates and follow the instructions to complete all critical updates.

### 2.2.5 Settings in Internet Explorer

**To change the settings in Internet Explorer:**

1. Start **Internet Explorer**.
2. Select **Tools** on the menu bar.
3. Select **Internet Options**.

The **Internet Options** dialog box will appear.
4. Click **Settings** in the **General** tab.

The **Settings** window will appear.

5. Select the radio button for **Every visit to the page**.

6. Click **OK** to exit the **Settings** window.

7. Click **OK** to exit the **Internet Options** dialog box.
2.2.6 Trusted Sites

To add the content management system to the trusted sites:

1. Start Internet Explorer.
2. Select Tools on the menu bar.
3. Select Internet Options.

The Internet Options dialog box will appear.

4. Select the Security tab.
5. Click **Trusted sites**.

6. Click **Sites**.

   The **Trusted sites** dialog box will appear.
7. Add the URL to the content management system in the **Add this Web site to the zone** field.

8. Click **Add**.

9. Click **OK** in the **Trusted sites** dialog box.

10. Click **OK** in the **Internet Options** dialog box.

   *Note: Pop-up blockers may affect the display of SiteExecutive windows and functionality. Pop-up blockers may have to be turned off.*

### 2.3 Supplemental Software

Although the supplemental software is not required to run SiteExecutive, it will enhance the experience if using SiteExecutive and will provide additional features.

#### 2.3.1 Recommended Utilities

**2.3.1.1 WinZip**

WinZip is an industry-standard tool, which compresses files for transfer and storage and is required for multiple file upload. An evaluation version of the software may be downloaded from:

http://www.winzip.com

*Note: Although other zip programs will function, WinZip is most compatible with SiteExecutive.*
2.3.1.2 Adobe Acrobat Reader

Adobe Acrobat Reader allows for the production of device-independent files that can be read, viewed, printed and edited on any platform that has the Acrobat Reader. The Adobe Acrobat Reader may be downloaded from:

http://www.adobe.com

2.3.2 Recommended Multimedia Support Software

2.3.2.1 QuickTime Application and Plug-ins

QuickTime provides a wide range of media services and multi-media support. Information on QuickTime and programs may be found at:

http://www.apple.com/quicktime

2.3.2.2 Microsoft Media Player

Microsoft Media Player is integrated into all current windows installations and is used widely in many Microsoft-integrated components. Information on Microsoft Media Player and programs may be found at:

http://www.microsoft.com

2.3.2.3 Shockwave and Flash Applications/Plug-ins

Shockwave and Flash are standard programs for dynamic multi-media and are widely used for news, entertainment and games. Information on Shockwave and Flash programs may be found at:

http://www.macromedia.com

2.3.2.4 Real Media Player

Real Media Player and Real tools take advantage of streaming the media and are widely implemented on media and news web sites. Information on Real Media Player and programs may be found at:

http://www.real.com

2.3.3 Support Software

The following software is recommended and is essential for regular content managers, although it is not required.

2.3.3.1 Adobe Acrobat 7.0

This program, which is the full version of Adobe Acrobat, provides the tools to create and manage Adobe PDF files created from any program. Information regarding this program may be found at:

http://www.adobe.com/products/acrobat
2.3.3.2 Commercial Image Programs

To produce high quality graphics, content managers must use flexible programs for editing and creating images. The following programs are recommended:

♦ **Adobe Photoshop**: Adobe Photoshop is a high-end tool for image preparation. More information on Adobe Photoshop may be found at:

  http://www.adobe.com/products/photoshop

♦ **Paint Shop Pro**: Paint Shop Pro provides professional image editing tools that allow precision graphic design capabilities. Information regarding Paint Shop Pro may be found at:

  http://www.paintshoppro.com

♦ **SnagIt**: This multi-featured screen capture utility obtains images, true text and videos for reference and provides graphic design capabilities. Information regarding SnagIt may be found at:

  http://www.techsmith.com/products/snagit

2.3.3.3 Template Design Programs

To produce high quality designs, designers may use template design tools and import the created files into SiteExecutive. Programs such as Dreamweaver let you work in a single environment to quickly create, build, and manage web sites and Internet applications. More information on Dreamweaver may be found at:

  http://www.macromedia.com/software/dreamweaver
3 Basic SiteExecutive Functions

To use SiteExecutive, content editors must have knowledge of basic SiteExecutive functions. These functions include:

♦ Accessing and logging onto SiteExecutive
♦ Understanding the Administrative Interface
♦ Using the site tree
♦ Identifying tabs
♦ Exiting SiteExecutive

3.1 Accessing SiteExecutive

Access to the content management system is through the web browser. SiteExecutive can be loaded by accessing an organization's primary web address with /se behind it. For example:

http://www.companydomain.com/se

3.1.1 Login Screen

Upon accessing SiteExecutive, the login screen will appear. This login screen can be modified to display an organization's logo.

To log into SiteExecutive:

1. Enter a valid username.
2. Enter a valid password.
3. Click the Login icon.

Upon logging in, the user’s default homepage will appear.
3.2 MySE

By default, when users log into SiteExecutive, a SiteExecutive homepage will appear. The homepage displays reports for pages and templates that are pending the user’s action. In addition, it allows users to save desired reports on the homepage for easy access. The reports that are queried can be saved with specific names and become available on MySE. To access the homepage from anywhere in SiteExecutive, users should click on MySE. Detailed information regarding MySE and the default homepage is available in the Site Administrator Training Guide.

Note: Users who upgrade from previous versions of SiteExecutive may not have the MySE homepage set up to appear by default.

3.3 Understanding the Administrative Interface

The Administrative Interface is designed with familiar and easy-to-recognize icons. The primary components of the Administrative Interface are illustrated below.
There are four primary areas in the Administrative Interface:

- **Tabs**: The tabs provide top-level functions and change to reflect the type of page, folder or object being accessed.

- **Site Tree**: The site tree holds all sites, folders, pages, templates, style sheets, images and files. It also holds all users/groups and modules. Once an object is created or uploaded to a site or folder, it becomes part of the SiteExecutive system and can be easily renamed, moved, or copied.

- **Information Area**: The information area changes based on the type of object selected in the tree. In this area, content managers will find tools to available functions. In the information area, content managers will also preview images and work with the text editor.

- **Object Information**: This area provides information about the sites, folders, pages, templates, style sheets, images or objects within the site tree.

### 3.4 Using the Site Tree

**To view or expand the contents in the site tree:**

- Click the plus sign located to the left of the object name.

![SiteExecutive Explorer](image)

This will expand the site tree content and will show all sub-contents. The plus sign will become a minus sign when the selected object is expanded.
To close or collapse the site tree:

- Click the minus sign located to the left of the object name. The minus sign will become a plus sign when the selected object is collapsed.

3.4.1 Selecting Objects in the Site Tree

To select objects in the site tree:

- Click on the desired object.

3.4.2 Hiding the Site Tree

The site tree may be hidden if more working space is desired.

To hide the site tree:

- Click the down arrow on the title bar of the site tree.

The information area will expand.

Clicking the left arrow will restore the site tree when it is hidden.
3.5 Identifying Tabs

Depending on the object selected, the various tab sets will appear.

3.5.1 Root and Folder Level Tabs

At the root and folder level, the tabs available are: General, Image Library, Properties and Audit Log.

3.5.1.1 General Tab

The General tab displays icons for available features or functions. Some of the features in the information area will be inactive (grayed out); this depends on the content manager's permission level. Content managers may access the General tab to perform various functions, including, but not limited to: creating pages, folders and templates, uploading files, creating forms, and deleting, renaming, copying and moving folders.
3.5.1.2 Image Library Tab

By default, the Image Library tab displays thumbnails of the images in the selected folder, along with properties for the images. The URL for each image is listed and can be copied and pasted into other applications. The URL should be used over the URI when trying to access images.

If there are no images in the direct folder, images in the subfolders may be viewed by selecting View images in this folder and all subfolders. At the root level, this option will read View images in this site and all subfolders. When this option is selected, all images will appear grouped by folder. Each folder can be opened or closed as desired.
3.5.1.3 Properties Tab

The **Properties** tab displays information regarding the selected folder. Folder properties are editable by content managers with the appropriate permissions.

3.5.1.4 Audit Log Tab

The **Audit Log** tab tracks all actions performed on the selected root or folder.
3.5.2 Page Level Tabs

At the page level, the tabs available are: General, Preview/Edit, Approval, Versions, Properties and Audit Log.

3.5.2.1 General Tab

The General tab displays icons for available features or functions. Some of the features in the information area will be inactive (grayed out); this depends on the content manager’s permission level. Content managers may access the General tab to perform various functions, including, but not limited to: purging archives, deleting, renaming, copying, and moving a page. Content managers may also replace content, suggest featured content and manage featured content.
3.5.2.2 Preview/Edit Tab

The **Preview/Edit** tab displays a preview of the selected page.

3.5.2.3 Approval Tab

The **Approval** tab allows content managers to approve and publish a page.
3.5.2.4 Versions Tab

The Versions tab shows all versions of the selected page.

3.5.2.5 Properties Tab

The Properties tab displays information regarding the selected page. Page properties are editable by content managers with the appropriate permissions.

3.5.2.6 Audit Log Tab

The Audit Log tab tracks all actions performed on the selected page.
3.5.3 Object Level Tabs

At the object level, the tabs available are: **General**, **Properties** and **Audit Log**.

3.5.3.1 General Tab

The **General** tab displays icons for available features or functions. Some of the features in the information area will be inactive (grayed out); this depends on the content manager's permission level. Content managers may access the **General** tab to perform various functions, including, but not limited to: deleting, replacing, renaming, copying and moving objects.

3.5.3.2 Properties Tab

The **Properties** tab displays a preview of the object, as well as pertinent information for the selected object.
3.5.3.3 Audit Log Tab

The Audit Log tab tracks all actions performed on the selected object.

3.6 Exiting SiteExecutive

To exit SiteExecutive:

♦ Click LogOut.

The login screen will appear.
4 Core SiteExecutive Content Management Skills

The average content manager must be familiar with the following core skills to create and maintain a web site:

♦ Creating folders and pages
♦ Editing and saving page content
♦ Approving and publishing content
♦ Uploading files and images
♦ Inserting images
♦ Inserting links and page anchors

4.1 Creating Folders and Pages

4.1.1 Creating Folders

Folders usually designate major site sections, departments, products, divisions, or similar organizational structures.

To create a folder:

1. Click on the plus sign to open the root of the site.
2. Select the desired department or section under which the new folder should be created. This is normally a folder-level object.
3. Select the General tab.
4. Double-click Create Folder in the information area.

The Create Folder dialog box will appear.
5. Enter information in the available fields.

   **Note:** **<< indicates that these fields require information. SiteExecutive will not allow content editors to proceed without completing these fields.**

   The fields are defined as follows:

   **Name<<:** Allows the designation of the folder’s name, as it will appear in the tree. This field will accept upper/lower case letters, hyphens, periods, underscores, numbers and spaces. This field is limited to 255 characters. The name entered will appear as part of the URL in the web browser window.

   **Title<<:** Designates the readable title of the folder (appears in various output sections, including the Site Map). This field will accept any letter, number or spaces. This field is limited to 40 characters.

   **Default Language<<:** Allows the selection of a language, which determines the default dictionary the system will use when spell checking content. This default dictionary may be changed at the individual page level.

   **Note:** The language selected at the folder level cascades to the pages created in that folder. At the page level, the language may be changed or additional languages may be selected.

   **Template:** Allows the selection of a template for the web site. Clicking on the **Select Link** icon opens the **Explorer** window, from which a created template may be selected. Templates are normally designed by a selected individual. Template designers, using certain tools, can establish an organization’s layout and color scheme for consistency on the web site.
**Note:** *The template selected at the folder level cascades to the pages created in that folder. At the page level, the template may be changed.*

**Error Page:** Permits the display of designated custom error page for 404 object not found error condition. Clicking on the Select Link icon opens the Explorer window, from which a created error page may be selected.

**Summary:** Allows the entry of descriptive information for the folder (appears in various sections, including the Properties tab, modules displayed and search results). This field is limited to 255 characters.

6. Click **Save**.

The site tree will refresh and the created folder will appear selected.

---

**4.1.2 Creating Pages within Folders**

**To create a page:**

1. Select the desired folder in the site tree.

2. Select the General tab.

3. Double-click **Create Page** in the information area.
The Create Page dialog box will appear.

4. Enter information in the available fields.

The fields are defined as follows:

**Name**: Refers to the file name that will appear in the tree. This field is limited to 255 characters. This field will accept upper/lower case letters, hyphens, periods, underscores, numbers and spaces. The name entered will appear as part of the URL for the page. It is recommended that .htm or .html be used as extensions for pages.

*Note: The customary default page name for most web sites is index.html or default.html. This naming convention allows for SiteExecutive to load a page within a folder by default, even if a particular page is not selected. If the index file does not exist, users will receive an error message. Additional pages can follow any naming conventions.*

As a best practice, spaces should be avoided in the page name to avoid the insertion of additional characters in the URL as it will appear in the web browser window.
Title: Designates a readable reference to the page (example: Sam's Home Page). This field appears in various output sections, including the Site Map and the Title bar of the web browser window. This field will accept any letter, number or spaces and is limited to 255 characters.

Template: Allows the selection of a template. By default, the system pre-selects the template selected at the folder level. This can be changed at the page level.

Default Language: Allows the selection of a language, which determines the default dictionary the system will use when spell checking content. By default, the system pre-selects the language selected at the folder level. The dictionary may be changed at the page level.

Publish Date/Time: Used to launch a page on a specific date. The date must be in MM/DD/YYYY format or the calendar may be used. The time must be in HH:MM am/pm format. Entering a date and time will place the page in queue for publication. The page must still be approved and published for the page to be published on the specified date.

Expire Date/Time: Used to expire a page on a specific date. If this feature is selected, and the page is listed as a dynamic link, the link will be removed on the expiration date, eliminating broken links. The date must be in MM/DD/YYYY format or the calendar may be used. The time must be in HH:MM am/pm format. When expiration takes effect, the expire date must be changed before the page can be re-published. Notification of this will appear on the Approval tab.

SSL Enabled?: Invokes that a page be transmitted via a secure https connection. This is contingent upon an appropriately configured web server with a security certificate. SSL is an acronym for Secure Sockets Layer.

Searchable: Allows the object to be searchable. If deselected, the item will not be included in the search index.

Cache Interval: Allows a snapshot of the desired page to appear for visitors loading the page within the specified time frame. The use of cache intervals is recommended on pages that may take several minutes to load.

Author: Indicates the page author’s name.

Refresh Interval: Refers to the interval (in seconds) for which the page should refresh.

Refresh Location: Used for redirecting when a page is refreshed.

Summary: Allows the entry of descriptive information for the page (appears in various sections, including the Properties tab and search results). The summary is limited to 255 characters.
5. Click **Save**.
The site tree will refresh and the created page will appear selected.

4.2 Editing and Saving Page Content

4.2.1 Editing a Page

4.2.1.1 Opening a Page for Edits

To open a page for edits:

1. Select the desired page in the site tree.
2. Select the **Preview/Edit** tab.

The selected page with the assigned template will appear. From the **Preview/Edit** tab, content editors can edit a template or edit a page.

3. Click **Edit Page**.
The page will appear in edit mode with processor-like tools available on the editor toolbar for editing.

4.2.1.2 Entering Text

To enter text on the page:

1. Click in the page where the text will be entered.
2. Type desired text.

Note: The editor converts text to HTML in the background. When content editors press [Enter], the system creates a blank space between paragraphs. Content editors must press [Shift] + [Enter] to create lines without blank spaces between paragraphs. Soft returns, however, may result in object overlapping. The use of tables to provide structure is recommended.

Text entered will appear on the page.
4.2.1.3 The Editor Tools

While in edit mode, processor-like tools are available on the editor toolbar, allowing content editors to format text and perform other functions within a page.

The tools are defined as follows:

<table>
<thead>
<tr>
<th>Tools</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold, Italic, Underline</strong></td>
<td>Provides formatting options; these attributes may be applied to any text entered on the page.</td>
</tr>
<tr>
<td><strong>Left Flush Text, Center Text, Right Flush Text</strong></td>
<td>Aligns selected text and paragraphs to the left, center or right of the page.</td>
</tr>
<tr>
<td><strong>Indent Paragraph, Outdent Paragraph</strong></td>
<td>Moves selected paragraph approximately ¼&quot; to the right or left of the page.</td>
</tr>
<tr>
<td><strong>Ordered List, Unordered List</strong></td>
<td>Creates numbered lists and bulleted lists.</td>
</tr>
</tbody>
</table>
Tools:

Description:

Find, Replace
Allows the search and replacement of specified text.

Undo, Redo
Undo reverses the last editing action and Redo annuls the last Undo action performed.

Note: The Undo and Redo tools should be used with caution, especially with tables. The tool will undo or redo individual tags. Users may have to click Undo or Redo several times before it will completely undo or redo the last performed function.

Spell Check
Provides a spell check for page content based on the default dictionary.

Note: While this tool spell checks against modules, it does not save changes made to spelling in modules.

Page Dictionary and Spell Check
Displays multi-language dictionaries available and allows the changes of the default dictionary options for the selected page.

Note: Multiple dictionaries must be selected each time the spell check will be performed.

Insert Special Characters
Inserts special characters into the page content.

Insert Horizontal Rule
Inserts a horizontal rule. The alignment, width, color, size and shading of the rule may be specified.

Note: This should be used to separate objects or text. When inserted, the rule will display with space before and after it, therefore it cannot be used to underline text.

Insert a Table
Inserts an HTML-based table.

Insert an Image
Inserts a graphic on the page from the site tree.
Tools: Description:

Insert a Link
Creates HTML links from text or objects to other pages or elements in the site tree. Allows the creation of Internal, External, MailTo and Anchor links.

Insert an Anchor
Creates a target location within a page that can be referenced to point to a specific part of a page. Anchors can be used to link to targeted points in other pages.

Insert a Module
Allows for inclusion of modules that provide a wide range of enhanced functions.

Note: To place modules beside each other, the use of tables is recommended.

Font Style
Allows changes in the text style and font. These are fixed styles created in the style sheet that was applied to the template the selected page is using.

Preview
Allows object and/or page contents to be viewed within the template, as it will appear when rendered in the web browser window. This tool will display a preview of most (not all) the objects entered on a page or template.

Save, Close, Save and Close
Save commits changes to the database. Close closes the window and prompts users to save editing completed. Save and Close commits changes to the database and closes the editor simultaneously.

To edit page content using the formatting tools:
1. Select the desired text.
2. Click the desired tool for formatting changes.

Note: Additional tools or features may be defined at the style sheet level. For example, subscript text and superscript text may be established in a style sheet. Such properties will become available to editors if defined on the style sheet that is applied to the body content at the template level.
4.2.1.4 Using the Page Dictionary and Spell Check Tool

Although the default language for a web site is selected at the site level, folder level and/or page level, individual users may modify an individual page’s dictionary for spell checking. This allows content editors to spell check content entered using a specific language dictionary. In addition, it allows users to spell check content against more than one dictionary.

The spell check feature allows content editors to spell check content against a selected dictionary, a global user dictionary and a site user dictionary.

To use the page dictionary and spell check feature:

1. Select the desired page in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Page.
4. Click the Page Dictionary and Spell Check tool.

The Spell Check dialog box will appear.
5. Select the desired options to perform a customized spell check.

The available options are defined as follows:

- **Selected Dictionaries**: Displays the default dictionary depending on the language selected at the page level. If the use of multiple dictionaries is desired, multiple dictionaries must be selected each time a spell check will be performed.

- **Available Dictionaries**: Displays other dictionaries that are available for spell checking. Selecting another dictionary in this field and clicking on the Select Dictionary tool will allow the use of multiple dictionaries. Selecting a dictionary in the Selected Dictionaries: field and clicking on the Deselect Dictionary tool will remove the selected dictionary to eliminate the use of that dictionary.

- **Ignore capitalized words**: Disregards words that are capitalized.

- **Ignore all-caps words**: Disregards words that are completely capitalized.

- **Ignore words with numbers**: Disregards words that are mixed with numbers.

- **Ignore words with mixed case**: Disregards words that use capitalized and non-capitalized letters.

- **Ignore domain names**: Disregards domains or URLs.

- **Report capitalization errors**: Indicates errors in capitalization.

- **Report doubled words**: Indicates words that are used more than once together.

- **Case sensitive**: Depicts words that are using incorrect capitalization.

- **Suggest split words**: Indicates multiple words that are consolidated.

- **Ignore non-alpha words**: Disregards words that are all numerical.

- **Split hyphenated words**: Separates all hyphenated words.

- **Allow Accented Capitals**: Allows the use of accents (normally for other languages) on capitalized letters.

- **Report Mixed Case**: Indicates words that are using capitalized and non-capitalized letters.

- **Report Mixed Digits**: Indicates words that are mixed with numbers.

- **Split Contracted Words**: Splits words that are combined with a single quote mark (normally used in other languages).

- **Split Words**: Separates words.

4.2.2 Saving and Closing Page Content in Edit Mode

When a page is edited, revisions are only committed when that page is saved. If no changes are made to a page, content editors may navigate to other areas in SiteExecutive. However, if changes are made to a page, all content must be saved before exiting.

4.2.2.1 Saving Page Content

To save page content:

- While the page is in edit mode, click the **Save** tool.
This will commit the changes to the database. The page will appear in edit mode for further editing.

4.2.2.2 Closing Page Content

To close page content:

- While the page is in edit mode, click the Close tool.

This will close the edit session. The page preview will appear. If the page was edited but not saved, the system will prompt the user to save contents or close the page without saving changes.

![Image of unsaved changes prompt]

4.2.2.3 Saving and Closing Page Content

To simultaneously save and close page content:

- While the page is in edit mode, click the Save and Close tool.

This will commit changes to the database and will close the edit session. The page preview will appear.

*Note: In some instances, a page must be saved for revisions to be visible.*

4.3 Approving and Publishing Page Content

Approving and publishing a page makes the page available for general web access.

*Note: Content must be saved before approving a page.*

4.3.1 Approving and Publishing a Page

To approve and publish a page:

1. Select the desired page in the site tree.
2. Select the Approval tab.
3. Click Publish Document.
Note: If a page has a workflow policy established, the Publish Document tool will not be available. A Begin Approval tool will be available instead.

The Publish Document dialog box will appear.

4. Click OK to publish the page.

The Approval tab will display the Approval Workflow History, which presents the date and time of publication, as well as the username of the person who published the page.

4.3.2 Viewing Different Versions of a Page

Pages become available to the general public when they are approved and published. When a page is published, the previous version of that page is archived. Archived versions of a page may be accessed via the Versions tab.

To view all available versions of a page:

1. Select the desired page in the site tree.
2. Select the Preview/Edit tab.
3. Click on the Version: drop-down list to see available versions.
4.3.3 Viewing the Published Page

To view a page once it is published:

♦ Click the page name to link to that page. The page link will appear directly below the tabs on every tab.

The page, as it will appear on the web site to the general public, will appear.

4.3.4 In-Line Editing

When a page is viewed in the web browser window, content editors may access an editable version of the page in SiteExecutive for further editing.

Note: This may not be available if authoring and rendering servers have been separated for desired security.
To access a page in SiteExecutive from the web browser window:

1. Go to the desired page in the web browser window.

2. Type /se behind the URL in the Address field.

The login screen for SiteExecutive will appear, if the user is not already logged into SiteExecutive. Upon logging into SiteExecutive, an editable version of the page will appear.

If the address is set to a page with a parameter at the end, the parameter must be deleted before /se is entered. In-line editing will not work properly if /se is entered after the specific parameters. In the example below, “/?c=1&id=20000&qr=ltcomcase” must be deleted first. /se may be entered immediately following the page name.

4.4 Uploading Files and Images

4.4.1 Uploading Files and Images

SiteExecutive makes it easy to add files and images to the site tree. Content editors may download personal files from external locations and upload them into SiteExecutive for use on SiteExecutive pages.

To upload a file to the site tree:

1. Select the desired folder in the site tree.
2. Select the General tab.

The Upload File dialog box will appear.
4. Click **Browse** to search for the desired file or image.

   The **Choose file** dialog box will appear.

5. Select the desired folder location or drive location using the drop-down arrow in the **Look in:** field.

6. Double-click the desired folder.

7. Select the desired file or image.
8. Click **Open**.

The **Choose file** dialog box will close. The path and name of the selected file will appear in the **File:** field in the **Upload File** dialog box.

9. Enter information in the available fields.

   The fields are defined as follows:

   - **New Filename:** Renames the file. This field is limited to 212 characters.

   **Note:** If a new filename is entered in the New Filename: field, the file extension must be included.

   - **Searchable:** Allows the object to be searchable. If deselected, the item will not be included in the search index.
**Description**: Refers to a summary of the file. This field is limited to 500 characters.

10. Click **Upload**.

The site tree will refresh and the uploaded file will appear selected.

Compressed files and files in .pdf format may be uploaded into SiteExecutive as single files and used as such within SiteExecutive. For example, a .zip file may be uploaded as a single file, using the **Upload File** tool. Links may be created to allow users to open these files. Images indicating the file types may also be uploaded into SiteExecutive and inserted beside the file name. This allows users to determine the file type.

### 4.4.2 Uploading Multiple Files

SiteExecutive also allows multiple files to be uploaded via a zip file. This feature will allow content editors to unzip a zip file that contains several files and import them into SiteExecutive as individual files. Content editors have the option to maintain path information and/or upload the compressed file along with the individual files.

**To zip or compress numerous files in the Windows environment:**

1. Select the desired files. Multiple files may be selected by simultaneously holding the [Ctrl] key and selecting each desired file.

2. Right-click on the files.

3. Select **Send To** or **WinZip**. The option may vary depending on the zip program and system being used.

4. Select **Compressed (zipped) Folder** or **Add to Zip file...** to create a new zip file containing the selected files.
All compressed files will appear as a zip file.

To upload the zipped files into SiteExecutive:

1. Select the desired folder in the site tree.
2. Select the General tab.
3. Double-click Upload Multiple Files in the information area.

The Upload Multiple Files dialog box will appear.
4. Click **Browse** in the **Select Compressed File:** field.

   The **Choose file** dialog box will appear.

   ![Upload Multiple Files dialog box](image)

5. Select the desired folder location or drive location using the drop-down arrow in the **Look in:** field.

6. Double-click the desired folder.

7. Select the desired zip file.

8. Click **Open**.

   The **Choose file** dialog box will close. The path and name of the selected file will appear in the **Select Compressed File:** field in the **Upload Multiple Files** dialog box.

9. Select the available fields if desired.
The fields are defined as follows:

**Searchable**: Allows the individual files to be searchable. If deselected, the files will not be included in the search index. Binaries with text may be made searchable. However, files, such as images, cannot be made searchable.

**Maintain Path Info**: Recreates any file structure that has been pulled into the zip file.

**Save Compressed File**: Copies the zip file itself to the primary folder along with each individual file.

**Description**: Refers to a summary of the file. This field is limited to 500 characters.

10. Click **Upload**.

The site tree will refresh and the zip file will be uploaded and unzipped in the selected folder. The files may be located in a newly created folder, which retains the path information.

*Note: This process may take several minutes depending on the number and size of the files.*

Once uploaded to the site tree, these files become available to be placed on pages and templates in SiteExecutive.

### 4.4.3 File Extensions

The use of extensions is critical; these extensions indicate the program that was used to create the file and the program that should be used to open the file.

Some common extensions include:

- Word: .doc
- Text: .txt
- PowerPoint: .ppt or .pps
- Excel: .xls or .xlw
- Access: .mdb
- Acrobat: .pdf
- WordPerfect: .wp4, .wp5, etc.
- Shockwave: .swf
- Real Media: .rm, .ram
- Windows Media: .wmf
- Audio/Visual: .wav, .mp3, .avi, .wav, .mpeg
- Zip: .zip

SiteExecutive allows renaming of any file and uploading files with or without extensions. It is essential that the correct extensions be used in the site tree since this will allow users to identify what programs should be used to open files.
4.5 Inserting Images

4.5.1 Inserting Images

To insert an image on a page:

1. Select the desired page in the site tree.

2. Select the Preview/Edit tab.

3. Click Edit Page.

4. Click in the page where the image will be inserted.

5. Click the Insert an Image tool.

The Insert Image dialog box will appear.
6. Click **Select Image** to search for the desired image.

The **Image Selector** dialog box will appear.
7. Search for the desired image by opening the site tree and the desired folders until the image is located.

8. Select the desired image.

A preview of the selected image will appear.

9. Click Select.

The Image Selector dialog box will close. The Insert Image dialog box will remain open and will show the image name in the Image: field.
10. Enter information in the available fields.

The fields are defined as follows:

*Note: All size measurements in the dialog boxes are in pixels or points (the two are synonymous). One inch equals 72 points.*

*Alt Text*: Generates an alternative text tag that is visible when the pointer is placed over an image; this assists with Section 508 compliance for sight-impaired access. This field is limited to 50 characters.

*Class*: Allows the selection of a font type, which was created via a style sheet and placed on the template assigned to the page.

*Align*: Refers to the position of the image on the page relative to surrounding objects or text. By default the image will be inserted without any alignment. When images are inserted on a page with no alignment or center alignment, they will appear in div tags. This avoids text and objects wrapping around the images.
**Border:** Places a border around your image.

**Horizontal Spacing/Vertical Spacing:** Creates space around the image to offset text and objects.

**Width/Height:** Refers to the size of an image. Images have a default height and width, which are determined by the actual pixel size of the image when it was created and uploaded.

**Scale:** Refers to the scale percentage of the image as compared to the original image. Allows proportional resizing of an image. When a percentage is entered, the width and height of the image will automatically calculate to avoid distortion.

**Reset:** Reverts image back to the original size.

**Enable:** Enables users to link two images together. When the pointer is placed on an image, the system will display a second image. This is used primarily for buttons and other navigation features. It is important that both the images (primary and rollover) be approximately the same size to avoid distortion. When **Enable** is selected, another image may be selected.

The **Insert Image** dialog box will display the selected rollover image’s dimensions and size.

11. Click **Save**.

The image will appear on the page.
Note: If images are inserted with alignment of left or right, items may float beside the images. To avoid other elements floating and overlapping on images, the use of tables to provide structure is recommended. A table inserted below an image and separated by a soft return will display on the image and will make the image disappear.

4.5.1.1 Modifying Image Properties

To modify image properties:

1. Select the desired image while the page is in edit mode.
2. Right-click on the image.

The Image Properties dialog box will appear.
4. Make necessary modifications.

5. Click **Save**.

### 4.6 Inserting Links and Page Anchors

#### 4.6.1 Understanding Links

In almost all web pages, navigation is accomplished through links. Links lead to other pages, images, files, movies, music, media and many other forms of information.

With SiteExecutive, content editors may create links that will update dynamically as pages are approved, moved, or deleted. If the object to which a link is pointing to is deleted, the properties for the link may be accessed. The properties will appear blank, though modifications will be allowed.

*Note: Underlining of text most often identifies text links, which makes it hard for users to distinguish between links and text that has been formatted to appear underlined. At the style sheet level, designers may determine how links should appear to visitors.*

#### 4.6.2 Inserting Internal Links

SiteExecutive allows for content editors to insert internal links, enabling visitors to navigate to other pages created in SiteExecutive.

**To insert an internal link:**
1. Select the desired page in the site tree.

2. Select the **Preview/Edit** tab.

3. Click **Edit Page**.

   The page will appear in edit mode.

4. Select the desired text or image for the link.

5. Click the **Insert a Link** tool.

   The **Create Link** dialog box will appear.
6. From the **Type** drop-down list, select **Internal Link**.

7. Enter information in the available fields.

The fields are defined as follows:

- **Link**: Allows the selection of the page to be linked. Clicking on the Select Link tool will allow users to access pages in the SiteExecutive site tree. All pages in the site tree will be available. If an un-published page is selected, the text will not appear as a link until that page is published.

- **Class**: Allows the selection of a font type, which was created via a style sheet and placed on the template assigned to the page.

- **Title**: Displays the name of the link when the mouse pointer is placed on the link. This field is limited to 80 characters.

- **Open link in a new window**: Forces the linked web site to open in a new browser window. When this option is selected, additional window options become available. Users have the ability to define the width and height in pixels of the new window. If width and height values are not entered, the new window will open in the web browser’s default size. Users may also choose to display a toolbar for the new window.

8. Click **Save**.

The selected text in the page will appear as a link. Clicking on the text or image will take visitors to the designated link.

**Note**: The page must be saved for the link to appear.
4.6.3 Inserting External Links

*SiteExecutive* allows for content editors to insert external links, enabling visitors to access sites outside of *SiteExecutive*. External links can be inserted using a qualified URL.

**To insert an external link:**

1. Select the desired page in the site tree.

2. Select the **Preview/Edit** tab.

3. Click **Edit Page**.

The page will appear in edit mode.

4. Select the desired text or image for the link.

5. Click the **Insert a Link** tool.

The **Create Link** dialog box will appear.
6. From the **Type:** drop-down list, select **External Link**. When **External** is selected, the **Select Link** icon will disappear.

7. Enter information in the available fields.

   - **Link:** Allows a qualified URL to be entered.
   - **Class:** Allows the selection of a font type, which was created via a style sheet and placed on the template assigned to the page.
   - **Title:** Displays the name of the link when the mouse pointer is placed on the link. This field is limited to 80 characters.
   - **Open link in a new window:** Forces the linked web site to open in a new browser window. When this option is selected, additional window options become available. Users have the ability to define the width and height in pixels of the new window. If width and height values are not entered, the new window will open in the web browser’s default size. Users may also choose to display a toolbar for the new window.
8. Click **Save**.

The selected text in the page will appear as a link. Clicking on the text or image will take visitors to the designated link.

### 4.6.4 Creating MailTo Links

SiteExecutive enables content editors to create links that will generate mail using the **MailTo Link** feature.

**To create a MailTo link:**

1. Select the desired page in the site tree.
2. Select the **Preview/Edit** tab.
3. Click **Edit Page**.
4. Select the desired text or image for the link.
5. Click the **Insert a Link** tool.

The **Create Link** dialog box will appear.

6. Select **MailTo Link** from the **Type:** drop-down list.

E-mail options will become available.
7. Enter information in the available fields.

The fields are defined as follows:

**Class**: Allows the selection of a font type, which was created via a style sheet and placed on the template assigned to the page.

**Title**: Displays a name when the mouse pointer is placed on the link. This field is limited to 80 characters.

**To**: Refers to the complete e-mail address of the person to whom the message will be sent. Multiple addresses can be separated using a semi-colon or comma.

**CC**: Requires the e-mail addresses of the users who will receive a carbon copy of the message. Multiple addresses can be separated using a semi-colon or comma.

**BCC**: Requires the e-mail addresses of the users who will receive a blind carbon copy of the message. Multiple addresses can be separated using a semi-colon or comma.

**Subject**: Allows the entry of a topic for the e-mail message. This field is limited to 128 characters.

8. Click **Save**.

The selected text in the page will appear as a link. Clicking on the text or image will invoke the visitor’s default e-mail program and create a new blank e-mail message. This assumes the client has a working e-mail program. For critical information, the use of a form is recommended.
4.6.5 Creating Page Anchors and Anchor Links

Page anchors allow content editors to target a specific location within a page when linking. Anchors created as target points can be accessed via anchor links. An anchor may be created in a specific location of a page and an anchor link may be created in a different location to refer users back to the anchor that was created. Anchors may also link to other pages.

To create an anchor:

1. Select the desired page in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Page.
4. Click in the page where the anchor will be inserted.
5. Click the Insert an Anchor tool.

The Insert Anchor dialog box will appear.

6. Enter a name in the Name: << field. This field is limited to 40 characters.
7. Click Save.

An anchor will appear in the selected location on the page. The anchor will only appear when the page is in edit mode.

To create a Local Anchor link to target the anchor on the page:

1. Select the desired text or image for the link.
2. Click the Insert a Link tool.

The Create Link dialog box will appear.

3. Select Local Anchor from the Type: drop-down list.
4. Enter information in the available fields.

   The fields are defined as follows:

   **Anchor**: Allows the selection of an anchor that was already created.

   **Class**: Allows the selection of a font type, which was created via a style sheet and placed on the template assigned to the page.

   **Title**: Displays a name when the mouse pointer is placed on the link. This field is limited to 80 characters.

   **Open link in a new window**: Forces the targeted point of the page to open in a new browser window. When this option is selected, additional window options become available. Users have the ability to define the width and height in pixels of the new window. If width and height values are not entered, the new window will open in the web browser’s default size. Users may also choose to display a toolbar for the new window.

5. Click **Save**.

*Note: If an anchor from an external page is desired, an internal link to that page must be created. When the page is selected for the internal link, all anchors on that page will appear and may be selected.*
4.6.5.1 Modifying Link Properties

To modify link properties:

1. Select the desired link while the page is in edit mode.
2. Right-click on the link.
3. Select **Link Properties**.

   ![Link Properties](image)

   The **Link Properties** dialog box will appear.

4. Make necessary modifications.
5. Click **Save**.

4.6.5.2 Modifying Anchor Properties

To modify anchor properties:

1. Select the desired anchor while the page is in edit mode.
2. Right-click on the anchor.
3. Select **Anchor Properties**.
The **Update Anchor** dialog box will appear.

4. Make necessary modifications.
5. Click **Save**.
5 Advanced Dynamic Navigation

Content editors with more advanced SiteExecutive content management skills will be able to enhance the flow of information and will create a more effective navigation system.

5.1 Creating Advanced Dynamic Navigation

To create advanced dynamic navigation, three modules are recommended: What's New, What's Here and See Also. These modules enable a structured navigation system and allow information control. The modules are formatted and activated at the template level, but can be inserted at the page level by content editors.

What's New and What's Here produce text link boxes on a web page.

See Also creates a drop-down box with links.

These modules appear only if there is active, approved content for each of the links and will be invisible if there are no valid links.

Any links created in the box are entirely dynamic. If the page to which the links refer is renamed, archived, moved, or deleted, the link will reflect that by following the page or file or removing itself.

5.2 Adding What’s New Links

To insert links in the What’s New module:

1. Select the desired page in the site tree.
2. Select the Preview/Edit tab to create an editable version of the page and activate the module.
3. Select the General tab.
4. Double-click What’s New in the information area.
The **What's New** window will appear.

5. Click **Add**.

The **What's New Administration** dialog box will appear.
6. Enter information in the available fields.

   The fields are defined as follows:

   **Title**: Refers to a readable title, which will display on the page as a link. This field is limited to 255 characters.

   **Link**: Allows insertion of internal or external links. The Select Link icon displays the Explorer window and allows a SiteExecutive page to be selected. The Link to Another Site icon displays the Explorer window, which allows entry of a qualified URL. The Remove Link icon removes a link once it has been selected or entered.

   **Description**: Displays information regarding the link. This information will appear on the page and is an optional field.

   **Release Date/Expire Date**: Allows content editors to determine a date when the link will appear and disappear.

   **Active**: Allows content editors to deactivate a link without deleting it.

   **Open in New Window**: Forces the link to open in a new browser window.

7. Click **Save**.

   The **What's New** window will remain open, allowing content editors to enter subsequent **What's New** links.
8. Add subsequent **What's New** links (optional).

9. Click **Save**.

### 5.3 What’s Here and See Also

The **What's Here** and **See Also** modules function similarly to the **What's New** module. The **What's Here** module differs from the **What's New** module because it creates continuous but dynamic links. It does not require a release or expiration date. The **See Also** module differs from the **What's New** and **What's Here** modules because it creates a drop-down box with links instead of text links. The **See Also** module links do not display link descriptions.

### 5.4 Modifying Settings for the Advanced System Navigation Modules

To modify the settings for the **What's New**, **What's Here** and **See Also** modules:

1. Select the desired page in the site tree.
2. Select the **Preview/Edit** tab to create an editable version of the page and activate the module.
3. Select the **General** tab.
4. Double-click the desired module in the information area.
The window for the module selected will appear. (Example: the **What’s New** window appears when **What’s New** is double-clicked in the **General** tab).

![What's New Window](image)

The available features in the module window include:

- **Add**: Allows insertion of additional links.
- **Edit**: Allows settings for the selected link to be changed.
- **Delete**: Removes the link from the list.
- **Up arrow/Down arrow**: Moves the selected link to display links in desired order.

5. Make necessary changes to the links.
6. Click **Save**.
6 Tables

Tables can be used for tabular presentation (numbers, lists), for design (to organize pictures and ideas), or for page structure. SiteExecutive allows the use of the standard features of HTML tables. In addition, SiteExecutive allows tables created in Microsoft Word to be pasted into a page, while preserving the content within the cells.

Before using tables, some crucial points to consider include:

**Inserting a table:** A new table will have no alignment as the default, which will cause an extra line under the table. If only one table is being inserted, the extra space may not be visible, although it is there. However, if inserting a table into a table cell (embedded table), the space will be visible. The space is generated by the editor itself. This is logically correct. Because a table is a block level tag, users should not be able to add text right after the table. If the table is set to left alignment, the space will be removed. The table will become a floating object since the block tag rule is broken.

**Aligning items in a table cell:** In previous versions of SiteExecutive (prior to the introduction of cascading style sheets functionality), the alignment in a cell was controlled by three levels of settings. They are indent/outdent buttons (adding blockquote tag), alignment buttons (adding align attribute to p tag) and cell’s alignment property (setting align attribute in td tag). Indent/outdent buttons are the most influential, followed by the alignment buttons, then followed by a cell’s alignment property.

All levels of control on a cell would be applied as follows:

```
<td align="right">
<blockquote>
<p align="left">text</p>
</blockquote>
</td>
```

On the browser, the text will appear aligned to the left with one block indent (the “right” property for td will have no effect).

In addition, a new p tag will have no align attribute (add a new table, and a new p tag will appear). In this case, a cell’s alignment property will take effect (if not indented), but once an alignment option is selected on the editor, the p tag’s align attribute will get set and cannot be removed anymore. The cell alignment property will not take effect either. The whole paragraph and the hidden blank p tag must be removed.

With the introduction of style sheets in SiteExecutive version 3.5, a style can be applied to a cell and to the text in the cell, which means there are now five levels of control on alignment. The order from most influential to least influential is indent/outdent buttons (adding blockquote tag), alignment buttons (adding align attribute to p tag), cell’s style (setting class attribute in td tag with the text-align property in the corresponding style sheet set), cell’s alignment property (setting align attribute in td tag) and the text’s style in the cell with the text-align property in the corresponding style sheet set).
Applying a style to the text in a table cell: A style can be applied to either a cell or text in the cell. The text in the cell will vary in style depending on the properties defined for each style. For example: style 1 is applied to a cell and style 2 is applied to the text in the cell as follows:

```html
<td class="style1">
  <span class="style2">text</span>
</td>
```

The result will depend on how the style sheet is defined. In general, if there are any properties defined in style1 but not defined in style2, the text will inherit style1’s property, otherwise, style2 will be effective.

**Note:** The use of embedded tables is recommended over insertion of side-by-side tables to avoid overlapping of text and elements within the tables.

### 6.1 Inserting a Table

To insert a table into a page:

1. Select the desired page in the site tree.
2. Select the **Preview/Edit** tab.
3. Click **Edit Page**.
4. Click in the page where the table will be inserted.
5. Click the **Insert a Table** tool.

The **Insert Table** dialog box will appear.
6. Enter information in the available fields.

The fields are defined as follows:

**Columns/Rows**: Determines the number of horizontal and vertical cells desired. These are expressed as whole numbers.

**Class**: Allows the selection of a font type, which was created via a style sheet and placed on the template assigned to the page.

**Width/Height**: Determines the size of the table. These values can be expressed in pixels or points and in percentages. One inch equals 72 points (For example, 288 points would result in a 4 inch width). These values can also be expressed as percentages of the enclosing area (use the % character). A row will expand to the largest height specified for any of the cells in that column. A column will expand to the largest width specified for any of the cells in that column.

**Cell Spacing**: Controls the space between cells in a table. This value is expressed in pixels.

**Cell Padding**: Controls the space between the inside of a cell and any enclosing information. This value is expressed in pixels.

**Align**: Relates to the surrounding text or objects in a page. If no alignment is selected or center alignment is selected, text or objects in the page will be automatically placed underneath the table. The table will be inserted in a div tag to prevent text and objects from wrapping around the table.

*Note: Alignment attributes assigned to the table affect how the table will interact with elements around the outside of the table. Alignment applied to individual cells affect solely what is contained within the cell. Furthermore, the alignment of a table may not be reflected in the editor alignment tool. The table or cell alignment should be used over the editor alignment tool.*

**Background Color**: Determines the color of the table. The background color is expressed in six character sets made up of three hexadecimal numbers. SiteExecutive provides a standard spectrum of colors through the interface. Colors can also be entered in RGB values (Red/Green/Blue), which are provided through the image editors built into windows. RGB values are converted into hexadecimal codes automatically if entered. If no color is selected and no table background color is defined in the style sheet, the table will be transparent, therefore displaying cells in the background color of the template. If no color is selected and a table background color is defined in the style sheet, the table will retain the background color defined in the style sheet.
Summary: Refers to a description for the table. The table summary is used for Section 508 compliance and can be interpreted by non-visual media. The summary content is searchable and is limited to 255 characters.

Type: Refers to the border and creates a rim around the table. When a border is selected, the options to select a border style, border color and border width become available.

Text: Refers to the caption properties. Displays a title above the table. This field is limited to 255 characters. The caption is not visible while the page is in edit mode.

Class: Allows the selection of a font type, which was created via a style sheet and placed on the template assigned to the page.

Align: Refers to the position of the caption relative to the table.

7. Click Save.

The table will appear on the page.
8. Enter desired information in the table cells.

6.2 Accessing Table and Cell Modifying Features

Table and cell properties are available to editors while the page is in edit mode. Depending on where the cursor is placed, table and cell property menus may vary.

The following two menus may appear depending on the action performed. If the table is selected (the cursor is placed on the table border), a condensed menu will appear.

If a cell is selected, the extended table menu will appear.
To access the complete table and cell modifying features:

1. Select the desired page in the site tree.
2. Select the **Preview/Edit** tab.
3. Click **Edit Page**.
4. Click inside the desired table or cell.
5. Right-click on the cell.

The table and cell modifying features will appear.
These features include:

**Table Properties:** Allows the modification of the entire table’s properties.

**Cell Properties:** Allows the modification of individual cells.

**Row Properties:** Allows updates to an entire row starting with the selected cell.

**Column Properties:** Allows updates to an entire column starting with the selected cell.

**Merge Cell Horizontally:** Allows cells to join horizontally and displays the number of cells that are available for the merge.

**Merge Cell Vertically:** Allows cells to join vertically and displays the number of cells that are available for the merge.

**Split Cell Horizontally:** Splits the selected cell horizontally.

**Split Cell Vertically:** Splits the selected cell vertically.

**Add Column Left:** Inserts a column to the left of the column selected.

**Add Column Right:** Inserts a column to the right of the column selected.

**Delete Column:** Removes the column selected.

**Add Row Above:** Inserts a row above the row selected.

**Add Row Below:** Inserts a row below the row selected.

**Delete Row:** Deletes the row selected

**Align Top:** Positions information to the top of the selected cell.
**Align Middle:** Positions information in the middle of the selected cell.

**Align Bottom:** Positions information to the bottom of the selected cell.

6. Select the desired option for modifications.

### 6.2.1 Modifying Cell Properties

**To modify cell properties:**

1. Select the desired page in the site tree.
2. Select **Preview/Edit** tab.
3. Click **Edit Page**.
4. Select the desired cell.
5. Right-click on the cell.
6. Select **Cell Properties**.

The **Table Cell Properties** dialog box will appear.

![Table Cell Properties](image)

7. Enter information in the available fields.

The fields are defined as follows:

**Class:** Allows the selection of a font type, which was created via a style sheet and placed on the template assigned to the page.

**Width/Height:** Refers to the size of the cell. If there are two or more cells in a row or column, this is expressed as either a fixed number in pixels or a percentage of the overall table size.

**Alignment:** Refers to the horizontal position of the text or object within a cell.

**Vertical Alignment:** Refers to the vertical position of the text or object within a cell.

**No Wrap:** Keeps text or objects from wrapping in the cell. It is used frequently to keep images in line within a cell.
Background Color: Determines the color of cells and overrides background color selected in table properties.

Select Image: Allows the selection of an image uploaded into SiteExecutive as a background.

Deselect Image: Removes background image selected.

Advanced>>: Used for Section 508 compliance only. When selected, other properties become available. The ID and Axis properties are visible in the source code, although they do not display on the web site. The Table Header allows for a cell to be depicted as a header. Subsequent cells can then be associated with appropriate headers. Information entered in the advanced properties can be read or interpreted by screen reader tools.

8. Click Save.

The cell will appear with the changes.

Note: Additional tools or features may be defined at the style sheet level. For example, border colors may be established in a style sheet. Such properties will become available to editors if defined on the style sheet that is applied to the body content at the template level.

6.2.2 Inserting an External Table

In addition to creating tables in a SiteExecutive page, external tables created in Word may be inserted on a page.

Some important points regarding cutting, copying and pasting are:

- **Paste** is used to paste text or objects that were cut or copied from internal sources (such as another SiteExecutive page).
- **Paste External Data** is used to paste text or objects that were cut or copied from external sources (such as Word).

To paste an external table:

1. Cut or copy the table from Word.
2. Select the desired page in the site tree.
3. Select the Preview/Edit tab.
4. Click Edit Page.
5. Click in the page where the table will be inserted.
6. Right-click on the page.

Available options will appear.

| Copy | Cut | Paste | Paste External Data |

7. Select Paste External Data.
The table will appear on the page.

Note: If a table is copied from Word and pasted into a SiteExecutive page using the Paste External feature, the page should be saved and closed before modifications are made. Upon saving and closing the page, SiteExecutive will strip all formatting from the table. This will prevent erratic behavior if modifications are made to the table properties.

The Paste External feature should be used to paste all content from external sources (not limited to tables). Right-clicking on a page or template and selecting Paste will only paste content copied from internal (SiteExecutive) pages.
7 Core Modules

7.1 Using Modules

SiteExecutive facilitates the creation and management of web content. Within SiteExecutive, modules rapidly perform and automate aspects of managing a web site. Modules fall into two broad categories:

♦ General Content Management and Add-On modules: These include modules that display site outlines, paths to pages, time and date, drop-down menus, linking tools, etc. These modules are written by Systems Alliance, Inc.

♦ Custom modules: These modules assist in automating tasks that typically require the use of and/or understanding of significant amount of code and server configurations. Typical modules include form generation/processing tools, inclusion of media objects (like shockwave files), accessing external news feeds, and many others. These modules are written by Systems Alliance, Inc. and clients.

7.2 Inserting Modules on a Page

To insert modules on a page:

1. Select the desired page in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Page.
4. Click in the page where the module will be inserted.
5. Click the Insert a Module tool.

The Insert Module dialog box will appear.

6. Select the desired module in the Module: drop-down list.
7. Click Insert.
Note: Placing modules in table cells will allow modules to co-exist in a side-by-side manner. Modules may appear with extra spaces in other web browsers (such as Mozilla). When modules are inserted on pages, they should be previewed in other browsers to ensure that desired spacing is established.
7.3 Current Time Module

7.3.1 Inserting the Current Time Module

The Current Time module will display the time and/or date every time a page is loaded. The time and/or date are based on the server time and do not need to be updated manually.

To insert the Current Time module:
1. Select the desired page in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Page.
4. Click in the page where the module will be inserted.
5. Click the Insert a Module tool.

The Insert Module dialog box will appear.

7. Click Insert.

The Module Properties dialog box will appear.

8. Enter information in the available fields.
The fields are defined as follows:

**Format**: Defines the date format.

**Style**: Defines the date’s font type depending on the style sheet applied to the template.

**Format**: Defines the time format.

**Style**: Defines the time’s font type depending on the style sheet applied to the template.

9. Click **Save**.

The **Current Time** module will appear on the page.

7.3.2 Accessing Current Time Module Properties

To access Current Time module properties:

1. Select the desired module while the page is in edit mode.
2. Right-click on the module.
3. Select **Current Time Properties**.

The **Module Properties** dialog box will appear.
7.4 Content Search Module

The Content Search module introduces a search interface to a page. The underlying indexes are built dynamically after the page is approved. The search is handled by Verity via ColdFusion. When this module is inserted and the page is approved and published, this module will allow visitors to search content. The results rendered will display on the page where the module is inserted.

7.4.1 Inserting the Content Search Module

To insert the Content Search module:

1. Select the desired page in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Page.
4. Click in the page where the module will be inserted.
5. Click the Insert a Module tool.

The Insert Module dialog box will appear.


4. Click Insert.

The Module Properties dialog box will appear.
5. Enter information in the available fields.

The fields are defined as follows:

**Included Sites**: Lists the sites that will be searched.

**Available Sites**: Lists the sites that are not included in the search. These sites can be selected and placed on the **Included Sites** to be searched against.

**Header Style**: Refers to the font type of the header in the results list.

**Row Style**: Refers to the font type of the rows (even and odd) in the results list.

**Information Messages**: Refers to the font type of the caption above the results list.

**Header**: Displays a color in the header for the results list.

**Odd Rows**: Refers to the color of the odd rows in the results list.

**Even Rows**: Refers to the color of the even rows in the results list.

**Result Number**: Displays results in a numbered list.
Score: Refers to the probability that the result contains relevant information based on the searched term. It is calculated by Verity.

Title: Displays the page title for the pages in the results list.

Summary: Shows descriptive information associated with the pages in the results list. This will display the Summary that was entered in the page properties. If no summary was entered in the page properties, the results will display information returned by Verity. If Verity does not find anything, “No Summary Available” will appear in this section of the results.

Results Per Page: Refers to the number of pages displayed in the results.

Horizontal Align: Refers to the horizontal position of the search button in relation to the search box.

Vertical Align: Refers to the vertical position of the search button in relation to the search box

Use Image: Allows the use of an image as the search button. If this is selected, a Select button becomes available, allowing the selection of an image from the site tree.

Style: Refers to the text type within the search box.

Width: Refers to the horizontal size of the search box. This is measured in characters.

Advance Search Box: Provides advanced search options. This tool introduces a search box with specific search options.

6. Click Save.

The Content Search module will appear on the page.

If Advance Search Box was selected for display, visitors will have advanced search options available.
Within SiteExecutive, an explicit search is executed by default and the system returns results as follows:

- All words are converted into lower case.
- The system removes “and”, “or”, “not”, and “.”.
- The system accepts “*” only at the end of a word.
- If one word is entered, the system completes an exact search.
- If multiple words are entered, the system selects documents that include at least one of the search elements that are specified.
- The system counts the density of words, stemmed variations or phrases in a document and produces a relevance-ranked score for retrieved documents.
- Documents that render results are ranked based on the number of search elements found.

7.4.2 Accessing Content Search Module Properties

To access Content Search module properties:

1. Select the desired module while the page is in edit mode.
2. Right-click on the module.
3. Select Content Search Properties.

The Module Properties dialog box will appear.
7.5 Content Search (Targeted) Module

The Content Search (Targeted) module introduces a search interface to a page, much like the Content Search module does. The underlying indexes are built dynamically after the page is approved. The search is handled by Verity via ColdFusion. When this module is inserted and the page is approved and published, this module will allow visitors to search content. The Targeted Content Search module, unlike the Content Search module allows results to be displayed on a separate page.

7.5.1 Inserting the Targeted Content Search Module to Display a Search Interface

To insert the Targeted Content Search module:

1. Select the desired page in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Page.
4. Click in the page where the module will be inserted.
5. Click the Insert a Module tool.
   
   The Insert Module dialog box will appear.

6. Select Content Search (Targeted) in the Module: drop-down list.

7. Click Insert.
   
   The Module Properties dialog box will appear.
8. Enter information in the available fields.

The fields are defined as follows:

**Select Mode**: Establishes how the module will be used on the page. If the module is being placed on the page to display a search interface for visitors, **Search Mode** should be selected. If the module is being placed on the page in which the results will appear, **Search Target Mode** should be selected. **Search Target Mode** will be discussed in more detail in the next section.

**Result Page**: Defines the page on which results will appear. This allows content editors to select a page from the site tree to render results on a completely separate page.

**Container Style**: Defines the style for the search box.

**Input Box Style**: Defines the font style for the text entered in the search box by visitors.

**Button Position**: Determines the location of the search button relative to the search box.

**Set Focus**: Positions the cursor on the search box.

**Button Style**: Determines the font style for the search button title.
Alt Text: Displays text when the mouse pointer is placed on the search button.

Use Image Button: Allows an icon to be used instead of text for the search button.

Button Text: Refers to the text, which will appear on the search button.

Advance Search Box: Provides advanced search options. This tool introduces a search box with specific search options.

Advance Search Box Position: Determines the location of the advance search box.

Advance Box Style: Defines the style for the advance search box.

9. Click Save.

The Content Search (Targeted) module will appear on the page.

The search results will not render until the result’s properties are determined. To establish the properties for the results, the Targeted Search module must be inserted on the page with the Search Target Mode values defined.
7.5.2 Inserting the Targeted Content Search Module to Establish Result Rendering

To insert the Targeted Content Search module:

1. Select the desired page in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Page.
4. Click in the page where the module will be inserted.
5. Click the Insert a Module tool.

The Insert Module dialog box will appear.

6. Select Content Search (Targeted) in the Module: drop-down list.

7. Click Insert.

The Module Properties dialog box will appear.
8. Select **Search Target Mode** from the **Select Mode** drop-down list.

A warning message will appear.

9. Click **OK** to continue.
A preview of the results as they will appear to visitors will become available.

10. Click **Properties** to modify the properties of the results. Several tabs will become available.
The tabs, along with the available functions in each tab are defined as follows:

**General**
- **Container Style**: Defines the font style for the search box.
- **Table Style**: Determines the font style for the headings.
- **Default Style**: Determines the default style for all text.
- **Included Sites**: Lists the sites that are currently included for searching.
- **Excluded Sites**: Lists the sites that are available for searching.

**Top Message**
- **Style**: Determines the font style for the message that appears at the top of the search results.

**Header**
- **Style**: Determines the font style for the header.
- **Item**: Displays the results in an ordered list.
- **Relevance**: Displays the probability that the result contains relevant information based on the searched term. It is calculated by Verity.
- **Title**: Displays the page title.
- **Summary**: Displays the page summary. This summary is obtained from the page properties. If no summary was entered, information found by Verity will appear.

**Body**
- **Odd Row Style**: Determines the font style for text in the odd rows.
- **Even Row Style**: Determines the font style for text in the even rows.
- **Link Style**: Determines the font style for text that appears as links (such as the page title).
- **Results Per Page**: Refers to the number of results that will appear.

**Foot Message**
- **General Style**: Refers to font style of text at the footer. This excludes text that will appear as links or numbers.
- **Link Style**: Determines the font style for links at the footer.
- **Selected Number Style**: Determines the font style for numbers displayed in the footer.

11. Click **Save**.

The **Targeted Content Search** module will appear on the page while the page is in edit mode. This module only depicts how results will render on the selected page. The module must be placed on any page where search results will appear.
Note: This module does not render in preview mode. The module will not appear on the published page. Only the results will render when a search is performed.

7.5.3 Accessing Content Search (Targeted) Module Properties

To access Content Search (Targeted) module properties:

4. Select the desired module while the page is in edit mode.
5. Right-click on the module.

The Module Properties dialog box will appear.
7.6 DHTML Link Menu Module

This module is used to provide easy, dynamic site navigation. The module allows for the creation of structured menus, submenus and links that visitors can navigate through on web sites. DHTML Link menus should be inserted in table cells for best appearance.

*Note: Menus will not display for MAC browsers for versions lower than Netscape 6.1, 7.x and IE 5.2.2.*

7.6.1 Inserting the DHTML Link Menu Module

**To insert the DHTML Link Menu module:**

1. Select the desired page in the site tree.
2. Select the *Preview/Edit* tab.
3. Click *Edit Page*.
4. Click in the page where the module will be inserted.
5. Click the *Insert a Module* tool.

The *Insert Module* dialog box will appear.

6. Select *DHTML Link Menu* from the *Module: drop-down list.*

![Insert Module Dialog Box](image)

7. Click *Insert*.

The *Module Properties* dialog box will appear.
8. Enter information in the available fields.

The fields are defined as follows:

**Orientation**: Allows the submenus to appear to the top, left, bottom or right of the main menu. This defines where the menus will appear on the web site.

**Link**: Allows the selection of a link for the top-level page. A link is required for the top-level menu. If no link is desired, use of the page where the menu will appear is recommended.

**Menu Type**: Allows for the top menu to be displayed in text or with an image. If an image is selected, the following options become available:

- **Select**: Allows the selection of an image from the site tree.
- **Alt Text**: Displays text when the mouse pointer is placed on the image.
- **Enable Rollover**: Allows a second image to display when the mouse pointer is placed on the initial image.

If text is selected, the following options will become available:
Title: Displays a menu title.

Style: Refers to the font type for the title.

Rollover Color: Refers to the color for the title.

Underline Rollover: Displays a line beneath the title when the mouse pointer is placed on the title.

Font Style: Refers to the text style within the menus.

Menu Outline: Displays an outline break between the top menu and subsequent menus.

Outline Color: Refers to the color of the outline break between the top menu and subsequent menus.

Item Color: Displays background color of menu items.

Menu Width: Refers to the size of the menu. Size is measured in pixels.

Outline Width: Refers to the width of the outline break between the top menu and subsequent menus in pixels.

Highlight Color: Displays a color over information when the pointer is placed over the information.

A preview will appear in the preview area. Once the fields are complete and a top-level page has been selected, content editors may add submenu items, which will allow for further extension. Content editors also have the option of adding links, which do not allow for further extension of the menu.

To add submenu items:

9. Click the New Submenu icon below the Preview window.

The Add Menu Item dialog box will appear.

10. Enter information in the available fields.

The fields are defined as follows:

Title: Refers to a readable title for the submenu

Link: Allows the selection of an internal page for the link or the entry of a qualified URL to link to an external site.
Width: Refers to the horizontal size in pixels for the submenu.

11. Click Save.

12. Add subsequent submenus if desired.

The submenu items will appear under the top-level menu item in the preview area.

To add menu items as links to submenus:

13. Double-click on the desired submenu (the submenu will appear highlighted).

14. Click the New Link icon below the preview area.

The Add Menu Item dialog box will appear.

15. Enter information in the available fields.

The fields are defined as follows:

Title: Refers to a readable title for the link

Link: Allows the selection of an internal page for the link or the entry of a qualified URL to link to an external site.

Open in new window?: Forces the link to appear in a new web browser window.

16. Click Save.

17. Add subsequent menu items as links for submenus if desired.

The menus will appear in the preview area.

To insert a separator:

18. Click the Separator icon below the Preview window.
A separator will appear at the end of the menu.

<table>
<thead>
<tr>
<th>End User Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template Training</td>
</tr>
<tr>
<td>Administrator Training</td>
</tr>
<tr>
<td>Add-On Modules Training</td>
</tr>
<tr>
<td>Best Practices Training</td>
</tr>
</tbody>
</table>

19. Click **Save**.

The **DHTML Link Menu** module will appear on the page.

**Note:** In the Module Properties dialog box, there are tools available to edit, delete and rearrange the order of menu items, submenu items and links. The item must be selected prior to clicking on the desired tool.

### 7.6.2 Accessing DHTML Link Menu Module Properties

To access DHTML Link Menu module properties:

1. Select the desired module while the page is in edit mode.
2. Right-click on the module.
3. Select **DHTML Link Menu Properties**.

   ![DHTML Link Menu Properties]

   ![Delete Module]

The **Module Properties** dialog box will appear.
7.7 Featured Content Module

The **Featured Content** module allows content contributors to suggest their page as a “featured link” on another page that they do not own. The **Featured Content** module has an approval process built in, which allows the owner of that second page to approve or reject the suggested page to be featured. Once the suggested page is approved for feature on the second owner’s page, the module will display the featured pages as links.

*Note: The module first needs to be inserted on the page in which the featured links will be displayed. The module will behave as a placeholder until featured pages are approved for display. The module can only be inserted by the owner of a page.*

7.7.1 Inserting the Featured Content Module on a Page

This step is completed on the page where featured content will appear.

**To insert the Featured Content module:**

1. Select the desired page in the site tree.
2. Select the **Preview/Edit** tab.
3. Click **Edit Page**.
4. Click in the page where the module will be inserted.
5. Click the **Insert a Module** tool.

The **Insert Module** dialog box will appear.

6. Select **Featured Content Module** in the **Module**: drop-down list.

7. Click **Insert**.

The **Module Properties** dialog box will appear.
8. Enter information in the available fields.

The fields are defined as follows:

**Title**: Refers to a readable title of the featured content text box. The default title is **Featured Content** and will be used if this field is left blank.

**Outline Color**: Displays the selected color as an outline around the featured content.

**Outline Width**: Refers to the width of the border in pixels.

**Module Width**: Refers to the horizontal size of the featured content box in pixels.

**Text Style**: Refers to the font type for the header.

**Background Color**: Displays the selected color in the header background.

**Alignment**: Refers to the position of the header.

**Link Style**: Refers to the font type of the links for the featured content.

**Description Style**: Refers to the font type of the description.

**Background Color**: Displays a background color for the links.

**Show Bullet**: Displays bullets beside the links.

9. Click **Save**.

*Note: The module will NOT display on the page until featured content for that page has been approved by the page owner.*
7.7.2 Accessing Featured Content Module Properties

To access the Featured Content module properties:
1. Select the desired module while the page is in edit mode.
2. Right-click on the module.
3. Select **Featured Content Module Properties**.

The **Module Properties** dialog box will appear.

7.7.3 Promoting a Page for Feature on Another Page

This step is completed for the page, which will be promoted to be featured on another page.

To promote a page for feature on another page:
1. Select the desired page in the site tree.
2. Select the **General** tab.
3. Double-click **Suggest Featured Content** in the information area.

The **Suggest Featured Content** dialog box will appear. The **Suggest** tab will appear by default.
4. Enter information in the available fields.

The fields are defined as follows:

**Page(s):** Represents the page(s) on which the featured content will appear. Multiple pages may be selected. Published pages containing the **Featured Content** module will appear.

**Start Date:** Refers to the date that the featured item should appear.

**End Date:** Refers to the date that the featured item should disappear.

**Priority:** Assigns an importance level to the featured item.

**Title:** Refers to the name of the featured item. The summary will appear on the published page when the featured content is approved.

**Description:** Displays a summary for the item. The summary will appear on the published page when the featured content is approved.

5. Click **Save**.

The page will appear in the **Pending** tab.

*Note: The Pending tab and Featured tab are available to identify the pages on which the featured content is pending for display and the pages on which the featured content is displayed.*
7.7.4 Approving the Featured Content Pages for Display on another Page

This step is completed on the page, which will display the featured content. This approves all featured content before it appears on the published pages.

To approve the featured content page for display on another page:

1. Select the desired page in the site tree.
2. Select the **General** tab.
3. Double-click **Manage Featured Content** in the information area.

*Note: This option will only be available when featured content has been chosen for display.*

The **Manage Featured Content** window will appear. The **Approval** tab will appear by default. The tab will display pages that have been suggested for feature on the selected page.

4. Click the **Approve** icon to approve the content.

The link for suggested content may be clicked to view the featured content prior to approval.
The Approve Feature dialog box will appear.

5. Verify the properties for the featured content.

6. Click Approve to approve the content for display or click Reject to disapprove the content.

The Featured tab appears. The Featured tab displays the pages that are featured on the page. Once approved for feature, featured content properties may be edited. The featured content may also be cancelled.
7. Click Close in the Manage Featured Content window.

7.7.5 Viewing the Featured Content Module on the Page

To view the Featured Content module on the page:

1. Select the page hosting the module in the site tree.
2. Select the Preview/Edit tab.

The Featured Content module will appear on the page.

<table>
<thead>
<tr>
<th>Featured Content - Training Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Training Courses</td>
</tr>
<tr>
<td>Learn about the new courses offered.</td>
</tr>
</tbody>
</table>
7.8 HTTP Passthrough Module

The HTTP Passthrough module is inserted on a page to display content from other web sites. The module allows content from external sites to be embedded on a SiteExecutive page. A fully qualified or absolute URL is necessary for the web site content to be inserted. The HTTP Passthrough module allows dynamic functionality.

7.8.1 Inserting the HTTP Passthrough Module

To insert the HTTP Passthrough module:

1. Select the desired page in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Page.
4. Click in the page where the module will be inserted.
5. Click the Insert a Module tool.

The Insert Module dialog box will appear.

6. Select HTTP Passthrough from the Module: drop-down list.

7. Click Insert.

The Module Properties dialog box will appear.

8. Enter information in the available fields.
The fields are defined as follows:

**URL**: Allows the entry of a fully qualified URL (http://www.somesite.com) or an absolute URL (/myexcludedpage.htm).

**Display error messages**: Displays error messages when the page is not found.

**Include body content only**: Embeds only the main content of the external site. This strips out html and head tags, including their content and the open and close body tags. Only the body’s inner HTML will be displayed when this is selected.

**Strip JavaScript**: Removes all JavaScript from external content.

9. Click **Save**.

The **HTTP Passthrough** module will appear on the page. When the page is saved and closed, the information from the external site will appear embedded on the page.

![Image of the HTTP Passthrough module]

### 7.8.2 Accessing HTTP Passthrough Module Properties

To access the HTTP Passthrough module properties:

1. Select the desired module while the page is in edit mode.
2. Right-click on the module.
3. Select **HTTP Passthrough Properties**.

The **Module Properties** dialog box will appear.
7.9 Last Published Module

The **Last Published** module is inserted on a page to automatically display the last published date and/or time of the page.

7.9.1 Inserting the Last Published Module

To insert the Last Published module:

1. Select the desired page in the site tree.
2. Click the **Preview/Edit** tab.
3. Click **Edit Page**.
4. Click in the page where the module will be inserted.
5. Click the **Insert a Module** tool.

The **Insert Module** dialog box will appear.

6. Select **Last Published** from the **Module** drop-down list.

7. Click **Insert**.

The **Module Properties** dialog box will appear.

8. Enter information in the available fields.

The fields are defined as follows:
9. Click **Save**.

The **Last Published** module will appear on the page.

7.9.2 Accessing Last Published Module Properties

To access the Last Published module properties:

1. Select the desired module while the page is in edit mode.
2. Right-click on the module.
3. Select **Last Published Properties**.

The **Module Properties** dialog box will appear.
7.10 Object Inclusion Module

The **Object Inclusion** module is used to embed objects uploaded to or created in SiteExecutive onto a SiteExecutive page. The following objects can be embedded:

- Another SiteExecutive page.
- Audio files with the following extensions: .wav, .mid, .mp3, .m3u, .mpeg.
- Macromedia flash movies with the following extensions: .swf.
- Images with the following extensions: .gif, .jpg, .jpeg, .pjpeg, .png.
- Adobe files with the following extensions: .pdf.
- Multimedia files with the following extensions: .mov, .qt, .avi, .asf, .wma, .wmv, .asx, .wax, .wvx, .rm, .ra, .ram, .rpm.
- HTML files with the following extensions: .html, .htm.

To embed one of the above mentioned objects onto a SiteExecutive page, the objects must be available in the SiteExecutive tree. A given page will only be rendered once. Additional inclusions of that page will be ignored.

**Note:** If a “converted” 3.0 Flash File (i.e. from SiteExecutive v2.5 to SiteExecutive v3.0) is used in object inclusion, the height and width of the flash file must be entered into the object inclusion properties. If the height and width are not entered, the flash module will not appear.

The **Object Inclusion** module can also be inserted on a template to display dynamic content at the folder level. This function is explained in detail in the **Template User Guide**.

### 7.10.1 Inserting the Object Inclusion Module

**To insert the Object Inclusion module on a page:**

1. Select the desired page in the site tree.
2. Select the **Preview/Edit** tab.
3. Click **Edit Page**.
4. Click in the page where the module will be inserted.
5. Click the **Insert a Module** tool.

The **Insert Module** dialog box will appear.

6. Select **Object Inclusion** from the **Module**: drop-down list.
7. Click **Insert**.

The **Module Properties** dialog box will appear.

8. Enter information in the available fields.

The fields are defined as follows:

- **Object**<sup>1</sup>: Allows the inclusion of an object within **SiteExecutive**. The **Select Link** icon provides access to the files in the site tree. Once the object is selected, several **Display Settings** will become available. Some fields are required, depending on the object selected.

- **Module Name**<sup>2</sup>: Provides a title for the module.

9. Click **Save**.

The embedded object or content will display on the page.
7.10.2 Accessing Object Inclusion Module Properties

To access the Object Inclusion module properties:

1. Select the desired module while the page is in edit mode.
2. Right-click on the module.

The Module Properties dialog box will appear.
7.11 Print This Page Module

The **Print This Page** module is used to insert a link that allows the user to print the page in a user-friendly format.

7.11.1 Inserting the Print this Page Module

To insert the **Print this Page** module:

1. Select the desired page in the site tree.
2. Select the **Preview/Edit** tab.
3. Click **Edit Page**.
4. Click in the page where the module will be inserted.
5. Click the **Insert a Module** tool.
6. Select **Print This Page** from the **Module**: drop-down list.
7. Click **Insert**.

The **Module Properties** dialog box will appear.

---

![Insert Module Dialog](image1)

![Module Properties Dialog](image2)
8. Enter information in the available fields.

The fields are defined as follows:

**Style Sheet:** Allows the selection of a new style sheet for the new page that will be rendered as part of the module. Refers to the type of text used based on the predefined styles according to the template used.

**Template:** Allows the use of another template within SiteExecutive.

**Text:** Refers to the title of the link if Print This Page is not desired. By default, the system will display **Print this Page**.

**Style:** Refers to the type of font for the link.

**Icon:** Allows the selection of an image if an image is desired as the print command.

**Alt Text:** Displays text when the mouse pointer is positioned over the link text.

9. Click **Save**.

The **Print This Page** module will appear on the page.
7.11.2 Accessing Print This Page Module Properties

To access Print this Page module properties:

1. Select the desired module while the page is in edit mode.
2. Right-click on the module.
3. Select Print This Page Properties.

The Module Properties dialog box will appear.
7.12 Send To A Friend Module

The Send To A Friend module is inserted on a page to launch an e-mail message from one visitor to another person, providing a link to that page.

7.12.1 Inserting the Send To A Friend Module

To insert the Send To A Friend module:

1. Select the desired page in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Page.
4. Click in the page where the module will be inserted.
5. Click the Insert a Module tool.

The Insert Module dialog box will appear.

6. Select Send To A Friend from the Module: drop-down list.

7. Click Insert.

The Module Properties dialog box will appear.
8. Enter information in the available fields.

The fields are defined as follows:

**Subject**: Allows the insertion of a topic for the e-mail message.

**Content**: Displays text in the body of the e-mail message.

**Text**: Refers to the title of the link and overrides the default title, **Send to a Friend**.

**Style**: Refers to the text type for the link. This field becomes available when text is entered in the **Text** field.

**Icon**: Allows the selection of an image if an image is desired as the **Send To A Friend** command.

**Alt Text**: Displays text when the mouse pointer is positioned over the module. This field becomes available when an image is selected as the icon.

9. Click **Save**.

The **Send To A Friend** module will appear on the page.
When a site visitor clicks on the **Send to A Friend** link, the **Send this Page to a Friend** window will become available.
The visitor can fill out the form as desired to send the link to other visitors.

*Note: Multiple addresses can be entered and should be separated using a semi-colon or comma.*

### 7.12.2 Accessing Send To A Friend Module Properties

To access the Send To A Friend module properties:

1. Select the desired module while the page is in edit mode.
2. Right-click on the module.
3. Select *Send To A Friend Properties*.

The *Module Properties* dialog box will appear.
7.13 Site Information Module

The Site Information module is used to provide navigational features within a page or template.

7.13.1 Inserting the Site Information Module

To insert the Site Information module:

1. Select the desired page in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Page.
4. Click in the page where the module will be inserted.
5. Click the Insert a Module tool.

The Insert Module dialog box will appear.

6. Select Site Information from the Module: drop-down list.

7. Click Insert.

The Module Properties dialog box will appear.
8. Enter information in the available fields.

The fields are defined as follows:

- **Display**: Allows the display of the navigational trail, current filename, current page title, parent folder’s name, parent folder’s title or a qualified URL. If the display of the navigational trail is selected, additional options become available.

- **Show as Link**: Displays information as dynamic links.

- **Style**: Refers to the text type of the display.

- **Separator**: Allows the selection of a separator.

- **Suppress Home Page**: Avoids displaying a dynamic link to the home page of the site. This is useful when displaying the navigational trail on the site’s home page.

- **Suppress Folder Index Page**: Avoids displaying a dynamic link to the home page of the folder. This is useful when displaying the navigational trail on the folder’s home page.

- **Suppress Current Page**: Avoids displaying the page the module is displayed on.

Display samples are provided below:

<table>
<thead>
<tr>
<th>Navigational Trail</th>
<th>Home &gt; SE Training Area for New Users &gt; Sam Smith’s Folder &gt; Modules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Filename</td>
<td>modules.html</td>
</tr>
<tr>
<td>Current Page Title</td>
<td>Modules</td>
</tr>
<tr>
<td>Parent Folder’s Name</td>
<td>SamSmith</td>
</tr>
<tr>
<td>Parent Folder’s Title</td>
<td>Sam Smith's Folder</td>
</tr>
<tr>
<td>Fully Qualified URL</td>
<td><a href="http://base.train.mylabco.com/SETraining/SamSmith/modules.html">http://base.train.mylabco.com/SETraining/SamSmith/modules.html</a></td>
</tr>
</tbody>
</table>

9. Click **Save**.

The **Site Information** module will appear on the page.
7.13.2 Accessing Site Information Module Properties

To access the Site Information module properties:

1. Select the desired module while the page is in edit mode.
2. Right-click on the module.
3. Select Site Information Properties.

The Module Properties dialog box will appear.
7.14 Site Map Module

This module is used to include a dynamic outline of a web site. The module displays an outline of desired folders and pages on the selected page.

7.14.1 Inserting the Site Map Module

To insert the Site Map module:

1. Select the desired page in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Page.
4. Click in the page where the module will be inserted.
5. Click the Insert a Module tool.

The Insert Module dialog box will appear.

6. Select Site Map from the Module: drop-down list.

7. Click Insert.

The Module Properties dialog box will appear.
8. Enter information in the available fields.

   The fields are defined as follows:

   **Expanded**: Allows the replacement of the default minus sign used to indicate that a folder is expanded.

   **Collapsed**: Allows the replacement of the default plus sign used to indicate that a folder is collapsed.

   **Exclusions**: Eliminates certain folders within a site so that they do not appear in the site map.

   **Inclusions**: Includes certain folders within a site so that they appear in the site map.

   **Add**: Displays the site tree and allows users to select folders to include or exclude from the site map.

   **Remove**: Allows the removal of a folder or site added to the exclusion or inclusion list.

9. Click **Save**.

   The **Site Map** module will appear on the page.
7.14.2 Accessing Site Map Module Properties

To access the Site Map module properties:

1. Select the module on the page.
2. Right-click on the module.

The Module Properties dialog box will appear.
7.15 Site Outline Module

This module is similar to the Site Map module. It allows users to include a dynamic outline of a site. The difference between this module and the Site Map module is the layout of the information on a page.

7.15.1 Inserting the Site Outline Module

To insert the Site Outline module:

1. Select the desired page in the site tree.
2. Select the Preview/Edit tab.
3. Click Edit Page.
4. Click in the page where the module will be inserted.
5. Click the Insert a Module tool.

The Insert Module dialog box will appear.

6. Select Site Outline from the Module: drop-down list.

7. Click Insert.

The Module Properties dialog box will appear.
8. Enter information in the available fields.
   The fields are defined as follows:
   - **Topic Style**: Refers to the text type for the topic.
   - **Sub Topic Style**: Refers to the text type for the sub topic.
   - **Summary Style**: Select text type for the summaries.
   - **Top Level Object**: Selects the top-level object (either site or folder) to be included in the site outline.
   - **By Default**: Allows the inclusion or exclusion of folders and pages.
   - **Include Summary**: Displays the summary for each object.

9. Select or deselect folders and pages for inclusion or exclusion.
10. Click **Save**.

The **Site Outline** module will appear on the page.
7.15.2 Accessing Site Outline Module Properties

To access the Site Outline module properties:

1. Select the desired module while the page is in edit mode.
2. Right-click on the module.
3. Select Site Outline Properties.

The Module Properties dialog box will appear.
8 Advanced SiteExecutive Functions

Knowledge of the advanced SiteExecutive functions will allow content editors to more effectively manage and maintain web sites. Some of the advanced SiteExecutive functions include:

♦ Editing page properties
♦ Changing templates at the page level
♦ Renaming, moving and copying objects
♦ Replacing content
♦ Replacing files/images
♦ Deleting objects
♦ Accessing and sending the URL of a binary file
♦ Archiving and recalling pages
♦ Purging archives
♦ Exporting files
♦ Obtaining help

8.1 Editing Page Properties

While each page’s properties are defined when the page is created, the properties may be modified at any time.

To edit page properties:

1. Select the desired page in the site tree.
2. Select the Properties tab.

The Page Properties will appear in the information area.
3. Click **Edit**.

The page’s properties will appear. All properties can be edited except for the page name.

4. Click **Save**.
Note: The page may have to be re-published for modifications to become effective.

8.2 Changing Templates at the Page Level

Templates can be changed even after a page has been created and a template has been selected.

To change the template for an existing page:

1. Select the desired page in the site tree.
2. Select the Properties tab.

The Page Properties will appear in the information area.

3. Click Edit.

The page’s properties will appear.

4. Choose a new template in the Template:<< field by using the Select Link icon.
5. Click Select when the new template has been selected.
6. Click Save.

Note: The page may have to be re-published for modifications to become effective.
8.3 Renaming, Copying and Moving Objects

Users may rename objects and may copy and/or move objects from one location into another location if permission is not restricted. Renaming and moving a folder requires administrative rights.

At the site level, the following tool is available in the General tab:

![Rename Site](image)

At the folder level, the following tools are available in the General tab:

![Rename Folder](image)

![Copy Folder](image)

![Move Folder](image)

At the page level, the following tools are available in the General tab:

![Rename Page](image)

![Copy Page](image)

![Move Page](image)

At the image level, the following tools are available in the General tab:

![Rename Image](image)

![Copy Image](image)

![Move Image](image)

At the file level, the following tools are available in the General tab:

![Rename File](image)

![Copy File](image)

![Move File](image)

8.3.1 Renaming an Object

To rename an object:

1. Select the desired object in the site tree.
2. Select the General tab.
3. Double-click Rename “object type” in the information area.

The Rename “object type” dialog box will appear.
4. Enter a new name in the **Name:** field.

5. Click **Save**.

The site tree will refresh and the renamed object will appear selected.

Right-clicking on a desired object in the site tree will also allow renaming of the object. Selecting **Rename** will cause the **Rename** “object type” dialog box to appear.

If the renamed folder, page, image or object was linked to or from other pages, folders, documents or images, **SiteExecutive** will automatically manage the links and will update information as necessary.

### 8.3.2 Copying an Object

**To copy an object:**

1. Select the desired object in the site tree.
2. Select the **General** tab.
3. Double-click **Copy** “object type” in the information area.

The **Copy** “object type” dialog box will appear.
4. Select the desired destination for the object in the site tree.

   Note: Read/write access to a folder is required to copy an object into it.

5. Enter a new name for the object (optional).

6. Click Copy.

The site tree will refresh and the copied object will appear selected.

Right-clicking on and dragging a desired object in the site tree will also allow copying the object to a new destination. When dropped in the desired location, selecting Copy Here will place the object in the new location.

   Note: If a page is copied, it must be published in the new location, for it to become active.

8.3.3 Moving an Object

To move an object:

1. Select the desired object in the site tree.

2. Select the General tab.

3. Double-click Move “object type” in the information area.

The Move “object type” dialog box will appear.

4. Select the desired destination for the object in the site tree.

   Note: Read/write access to a folder is required to move an object into it.

5. Click Move.

The site tree will refresh and the moved object will appear selected.
Right-clicking on and dragging a desired object in the site tree will also allow moving the object to a new destination. When dropped in the desired location, selecting Move Here will place the object in the new location.

If the moved folder, page or object was linked to or from other pages, folders, documents or images, SiteExecutive will automatically manage the links and will update information as necessary.

8.4 Replacing Content

In SiteExecutive, content editors may replace the editable content of a page with the active content of another page. This allows users to retain the properties of the original page and replace solely the content.

To replace content:

1. Select the desired page in the site tree for which contents will be replaced.
2. Select the General tab.
3. Double-click Replace Content in the information area.

The Replace Content dialog box will appear.

4. Click the Select Link icon in the Source: field.

The Explorer window will appear.
5. Select the source page for content replacement.

6. Click Select.

The Replace Content dialog box will appear with the path name of the selected file.

7. Click Replace.

A warning message will appear informing the content editor of replacement results.
8. Click **OK** to continue.

The content replacement will process from the source. While the replacement is taking place, a processing bar will appear.

Content replacement creates an editable version of that page with the replaced content. The page must be published for the page to become active.
8.5 Replacing Files/Images

In SiteExecutive, uploaded files and images may be replaced as needed. This makes it easy for content editors to replace files and/or images without having to replace the image on the actual pages. The pages using the replaced files and/or images will dynamically update automatically.

At the file level, the following tool is available in the General tab:

![Replace File]

At the image level, the following tool is available in the General tab:

![Replace Image]

To replace a file:

1. Select the desired file in the site tree for which contents will be replaced.
2. Select the General tab.
3. Double-click Replace File in the information area.

The Replace File dialog box will appear.

![Replace File Dialog Box]

4. Enter information in the available fields.
   The fields are defined as follows:
File: Allows the selection of the file.

New Filename: Refers to the new name for the file. The extension must be included as part of the filename. This field is limited to 212 characters.

Searchable: Determines if the file should be searchable.

Description: Refers to the summary of the file. This field is limited to 500 characters.

5. Click **Upload**.

*Note: The process to replace an image is very similar to the process for replacing a file. When the image is selected, a Replace Image icon will be available in the General tab.*

### 8.6 Deleting Objects

Users have the ability to delete a created or uploaded site, folder, page, image or file.

At the site level, the following tool is available in the **General** tab:

![Delete Site](image)

At the folder level, the following tool is available in the **General** tab:

![Delete Folder](image)

At the page level, the following tool is available in the **General** tab:

![Delete Page](image)

At the image level, the following tool is available in the **General** tab:

![Delete Image](image)

At the file level, the following tool is available in the **General** tab:

![Delete File](image)

**To delete an object:**

1. Select the desired object in the site tree.
2. Select the **General** tab.
3. Double-click **Delete** "object type" in the information area.
The **Delete** “object type” dialog box will appear.

![Delete Folder Dialog Box](image)

The dialog box asks, **“Are you sure that you want to delete “object name”?**. It also warns the user that deletion of the object cannot be undone.

4. Click **OK** to delete the object or click **Cancel** to cancel.

The site tree will refresh with the deleted object no longer present.

Right-clicking on a desired object in the site tree will also allow deletion of an object. Selecting **Delete** will cause the **Delete** “object type” dialog box to appear.

When an object is deleted, the object cannot be recovered. Archiving is recommended to avoid deleting objects that may be needed in the future. Users can also move unwanted objects into another folder if desired. Deleting a folder requires administrative rights.

When an object is deleted, the deletion process monitor is started and any descendent objects are retrieved. The primary object is deleted. If there are descendant objects, the deletion process will be transferred to the background to allow the content editor to continue working in **SiteExecutive**, while the deletion continues. The process monitor will be updated to indicate the status of the process as deletion occurs.

### 8.7 Accessing and Sending the URL of a Binary File

Accessing and sending the URL of a binary file to a clipboard allows content editors to paste the path to the binary into another location. For example, if a content editor wishes to send the URL of a binary via e-mail, he/she may choose to send the URL to a clipboard and then paste the URL in an e-mail message.

**To send a binary’s URL to the Windows clipboard:**

1. Select the desired file in the site tree.
2. Right-click on the file.
3. A menu with file-specific options will appear.
Note: If the object has a URL property, this option will be enabled. If the object does not have a URL property, the option will be disabled.

4. Select URL to Clipboard.

The true URL will be copied into the Windows clipboard so that it can be pasted into another location.

To paste the URL into another location once it has been copied into the clipboard:

1. Access the location where pasting is desired (this may be a document, an e-mail message or any other location).

2. Paste the URL in that location. For example, if the location is a document, right-clicking in the document and selecting Paste will paste the true URL into the document.

The URL will appear in the desired location.

http://preview.siteexecutive.com/bin/r/p/Image_bus03_handshake.jpg

In SiteExecutive, objects are referenced by the bin path. Using the regular path causes the SiteExecutive rendering server to process the file, which adds an unnecessary load to the rendering server. Links from other sites to binary files should be created using the URL (bin path) to avoid additional load on SiteExecutive.

Note: The URL to binary files can also be accessed in the Image Library tab and in the Properties tab for a selected binary. The URL can be copied and pasted into other applications from these locations.
8.8 Archiving and Recalling Pages: The Versions Tab

The **Versions** tab allows content editors to control previously approved versions of a page.

**To archive a page and edit archived pages:**

1. Select the desired page in the site tree.
2. Select the **Versions** tab.

A list of previously archived pages will appear in the information area.

Content editors may choose to:

- **Archive Active Version**, which stores and disables currently approved and published pages. All links to the page will temporarily disappear and will reappear when the page is approved again.
- **Archive Editable Version**, which will archive the current editable version.
- **Edit Archive**, which allows an archived version of a page to be edited and approved again. To edit an archived version of the selected page, the **Edit Archive** tool may be used.
8.9 Purging Archives

Archived versions of a specific page may be purged or deleted from the system. Content editors have the ability to determine which archived versions of a page may be deleted by specifying a date.

To purge an archived version of a page:

1. Select the desired page in the site tree.
2. Select the General tab.
3. Double-click Purge Archives in the information area.

The Purge Archives dialog box will appear.

4. Enter information in the available fields.

   The fields are defined as follows:

   Select a date: Allows the selection of a date. Versions of the selected page older than the specified date will be purged.

   Purge all pages: Deletes all versions of all pages that were archived prior to the specified date. This is not folder-specific.

   Purge all versioned objects: Deletes all pages, templates, style sheets and other objects that were archived before the specified date. This is not folder-specific.

5. Click Purge.

A warning message will appear confirming the results of the purge.
6. Click **OK** to continue.

While the archive purge is taking place, a processing bar will appear.

*Note: This tool should be used with caution. It is not folder-specific.*

### 8.10 Exporting Files

Binary files may be exported in **SiteExecutive**. This allows files to be opened or saved as necessary.

**To export a file:**

1. Select the desired file in the site tree.
2. Select the **General** tab.
3. Double-click **Export File** in the information area.

The **File Download** dialog box will appear.

4. Select the desired option.

The file may be opened or saved. Clicking **Save** will open the **Save As** window. This provides users with the capability of saving the file to any desired location.
8.11 Obtaining Help

SiteExecutive has a built-in help feature, which provides access to documentation regarding the SiteExecutive toolset. While standard End User documentation is provided, the file used for Help may be replaced.

*Note: Adobe Acrobat Reader is required to open the file contained within the Help feature.*

To obtain help:

1. Click **Help** from any location in SiteExecutive.

   ![Help Menu](image)

   A .pdf file will open with documentation regarding SiteExecutive features.

2. Click **Search** within the .pdf file.

   ![Search PDF Pane](image)

   The **Search PDF** pane will appear.
3. Enter text for searching in the **What word or phrase would you like to search for?** field.

4. Click **Search**.

Results will render in the **Search PDF** pane.

5. Click on the desired search result.

The document will display the selected information.